

RESEARCH ARTICLE

Explaining radical policy change: the case of Venezuelan foreign policy

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This article uses the case study of the radical changes that have occurred in Venezuelan foreign policy to test the utility of different models of policy-making, looking specifically at policy transfer but more especially at two long-standing frameworks that look at policy-making in terms of societal or state interests as determining the orientation and contents of policy. Using the radical changes to foreign policy introduced by President Chávez as the case study, it was found that no one model is capable of explaining change. It is necessary to move between models and even add novel elements in order to understand the complexity of events and their underlying causes. In Venezuela, it was found that a society-centred model was the best fit for the period leading up to President Chávez's presidency when a state-centred model provided much greater explanatory power. Policy transfer figured little in the radical policy shifts but the incorporation of the concept of veto players into both society and state-centred models of policy-making proved useful.

Keywords: policy-making; radical policy change; Venezuela; Hugo Chávez; developing countries

Introduction

Policy change is mostly incremental but there are occasions when policy is radically transformed over a relatively short period of time. Such radical policy change is more common in developing countries where political volatility can be higher than in established liberal democracies and where weak states are vulnerable to outside influence. However, there has been surprisingly little attention paid to explanatory models for radical policy change, especially what analytical tools are best suited to provide informed understanding of the reasons for and mechanics of the change. In recent years, attention has focused more on policy transfer in relation to developing countries (Dolowitz and Marsh 1998, Common 2001, Evans 2004, Larmour 2005, McCourt and Foon 2007, Chulajata and Turner 2009) and to older literatures on policy diffusion and policy convergence (Moore 1963, Kerr 1983, Rogers 1995, Drezner 2001). These approaches share a common interest in using exogenous factors to explain why policies change, especially radically. There is certainly evidence to justify this interest – structural adjustment forced on developing countries by international financial institutions, the imposition of new political institutions following invasion by foreign powers, the institutional designs of external powers in the rebuilding of failed states, conforming to membership requirements when

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joining regional organisations, and even material and ideological guidance to revolutionary regimes. However, there are some radical policy changes in developing countries that do not appear to be strongly connected to exogenous factors but that are better explained through endogenous influences. In such cases, theories of policy transfer, policy diffusion and policy convergence are largely redundant. For these cases, analysts must utilise alternative tools. This article uses the case study of the radical changes that have occurred in Venezuelan foreign policy to test the utility of different models of policy-making, looking at policy transfer but more especially at two long-standing frameworks that deal with policy-making in terms of societal or state interests determining the orientation and contents of policy.

Policy-making in developing countries

There are three clusters of approaches to policy-making that have been employed to explain how the process operates in developing countries. The first cluster focuses on exogenous forces to explain how policies from one place and time are adopted in different times and places. A proliferation of terms has been invented to describe this phenomenon including policy transfer, policy convergence, policy diffusion, lesson-drawing, bandwagoning, policy borrowing, systematically pinching ideas, penetration, external inducement, authoritarian imposition and policy pushing (Stone 1999, 2003). In the past, the more structural approaches, such as policy convergence, have enjoyed prominence but over the last decade models and theories that stress agency have come to dominate, especially policy transfer (Dolowitz and Marsh 1998, 2000, Evans and Davies 1999, Common 2001, Evans 2004). Dolowitz and Marsh (1998, p. 38) define policy transfer as 'the process by which knowledge of ideas, institutions, policies and programmes in one time and/or place is fed into the policy-making arena in the development of policies and programmes in another time and/or place'. Thus, actors are engaged in the purposive selection and transfer of policies. The actors may be importers or exporters and come from different parts of government, international organisations, the private sector or civil society. Transfer may be voluntary or forced upon the recipients or some combination of the two. Whole policies may be transferred or only selected items according to the political processes operating among the network of stakeholders and to differences in country conditions that may act as constraints on the policy, for example ideological contrasts, language barriers and government capacity (Dolowitz and Marsh 1998).

The second cluster of approaches to policy-making in developing countries is comprised of society-centred models (Grindle and Thomas 1989) that derive explanation 'in terms of the power relations between social groups' (Turner and Hulme 1997, p. 64). They have a close association with structural explanations of social change, especially in the social class analysis version. According to this variant of society-centred models, policies are the products of conflicts between social classes that are conceptualised in terms of economic relationships. Policies emerge from the interactions between social classes. Landowners or industrialists or fractions of the bourgeoisie are class constructs that have figured prominently in the Latin American literature providing explanations of policy-making as have conflicting groups including peasants and the working class. The middle class has also been politically active sometimes siding with the opposition to the bourgeoisie or sometimes aligning with it to defend the status quo. While public officials are generally seen as the

formalisers of policies in social class models of developing countries, there are instances where the state is able to attain some autonomy. In such circumstances, a class of 'bureaucratic bourgeoisie' attains ascendancy to direct national development (Shivji 1976, O'Donnell 1988). Class models are closely related to dependency and world system theory approaches to international relations as they depict class relations on a global scale and see them as accounting for the historical trajectories of nations and the foreign policies of those nations.

Another leading society-centred approach to the explanation of policy-making has been that of pluralism whereby 'public policy results from the conflict, bargaining and coalition formation among a potentially large number of societal groups organized to protect or advance particular interests common to their members' (Grindle and Thomas 1989, p. 218). This is the ideal-type version of Western liberal democracy in which power is widely distributed across society among groups whose political interactions determine policy choices. 'The state acts largely as an arbiter in this democratic competition and responds to pressures coming from society' (Turner and Hulme 1997, p. 65). Unfortunately, this idealised picture of society is far removed from the reality of many developing countries especially those that have authoritarian or hybrid regimes and where large sections of the population are excluded from the policy process (Diamond 2002).

The final society-centred approach to policy-making in developing countries is public choice theory that, similar to pluralism, 'assumes that political society is composed of self-interested individuals who coalesce into organized interests' (Grindle and Thomas 1991, p. 24). Powerful and often narrow interests in society are able to penetrate the state and influence government officials to make policies which ensure the interest groups' favourable treatment in government policy. This enables us to explain why poor policy choices are made and perpetuated. Public choice theory indicates the barriers to reforms that would benefit society in general and the poor and disadvantaged in particular but that serve the interests of the powerful.

The third cluster of approaches to policy-making in developing countries is 'state-centred', so called because it focuses on 'decision-making within the organisational context of the state' (Grindle and Thomas 1989, p. 219). Analysis is concerned with the perceptions and interactions of state officials and much less with influences coming from society. Several variants can be identified under the society-centred label including rational actor, bureaucratic politics and state interests. While the pure version of the rational actor model does not apply to any empirical situation, there are 'softer rationalities in which the effect of constraints and the sub-optimal conditions of the real world are incorporated' (Turner and Hulme 1997, p. 68). For example, there is 'satisficing' behaviour in which state actors select policies that are satisfactory and sufficient (Lindblom 1979) and 'bounded rationality' that recognises the restraints of time and resources (Simon 1957). Such variations to the rational actor model tend to lead to an incrementalist view of policy-making in which state actors 'muddle through' rather than a perspective that explains radical policy change.

Another state-centred model of policy-making pays attention to bureaucratic politics in which 'executive and bureaucratic "players" compete over preferred solutions to particular policy problems and the use of resources available to them through their positions' (Grindle and Thomas 1991, p. 29). Government is a political arena in which all public officeholders are engaged in political strategies such as

coalition building, bargaining and compromise in order to achieve their personal or organisational objectives. As the state in developing countries is frequently extensive and many societal actors are excluded from policy-making, this approach has strengths in explaining policy choices especially in portfolios such as foreign relations. The final state-centred approach does not investigate micro-political processes but offers a broader perspective in which ‘the state appears to have some autonomy in defining the nature of public problems and developing solutions to them’ (Grindle and Thomas 1989, p. 220). This approach differs from social class models as it sees the state as analytically separable from society and to have its own interests such as national security, maintaining law and order, and developing beneficial relations with other countries. It fits well with Latin American ‘bureaucratic authoritarianism’ as described by O’Donnell (1988) and Chalmers’s (1994) notion of ‘embedded orientations’ whereby a government’s procedures and structures guide policy-making, such as the state’s leading role in the development of the Brazilian automotive industry.

The question this article addresses is which of these approaches or combination of them provides the analytical framework that best explains the radical changes in Venezuelan foreign policy under the presidency of Hugo Chávez. In order to accomplish this it is necessary to trace the history of Venezuelan foreign policy from the pro-American and elite-dominated Fourth Republic through the early years of the Fifth Republic when Chávez was focused on consolidating power and on to the post-2005 era when long-established and often conservative foreign policies were cancelled and replaced by radical alternatives.

The Fourth Republic of Venezuela (1959–1999)

The Fourth Republic of Venezuela formally began on 1 January 1959 when Rómulo Betancourt was sworn in as president. Democracy in this period was based on a liberal representative presidential model as expressed in the *Punto Fijo* Pact, an elite settlement and power-sharing agreement between three dominant political parties, namely, *Acción Democrática* (AD), *Comité de Organización Política Electoral Independiente: Partido Social Cristiano* (COPEI) and *Unión Republicana Democrática* (URD) (McCoy and Myers 2004). The *Punto Fijo* regime rapidly garnered a large amount of legitimacy both domestically and abroad. Venezuela provided a functioning example to other Latin American nations of how a democratic transition could be achieved and maintained. During the Cold War era, Venezuelan democracy was perceived as a clear case of exceptionalism in its resistance to communist influence, guerrilla insurgency and authoritarian rule, which at that time characterised many Latin American nations (McCoy and Myers 2004). At a time of political and social unrest in Latin America, Venezuela was held up as an exemplar to demonstrate that political change and national development could be obtained not just through the revolutionary Marxist Castro way, but alternatively, through the stable, capitalist and democratic Betancourt way (Schuyler 1996). It was, however, a democracy dominated by members of the country’s economic elite. They exerted strong influence over the policy process and ensured policy-making consistency – whichever political party was in control.

A primary reason for the extended tenure of Venezuela’s *Punto Fijo* democracy was the state’s capacity to distribute resources in a reasonably even manner to satisfy

demands from interest groups, potential veto groups in Venezuelan society and prevent organised dissent that might challenge the elite's hold on power (Ortiz 2004). With domestic policy-making driven by a society-centred distributive approach, opposition from prominent societal groups such as trade unions, smaller and more radical political parties, religious organisations and the military was minimalised. For policy-makers, the success of this approach depended on the continued economic growth of the Venezuelan economy that relied on a stable price for oil in the international economic system. The oil shocks of the late 1970s and early 1980s diminished the state's capacity to maintain a stable economic climate in Venezuela. Policy-makers were forced to devise policies that were reactive to the rapidly changing situation in the country but they were still 'made by elites for elites'. It was within this context of the Fourth Republic that 'social mobility decreased, and excluded groups turned on ruling elites' (McCoy and Myers 2004, p. 4).

The economic and political crises that engulfed Venezuela during the early 1990s produced three outcomes that ultimately led to a total transformation of the Venezuelan political system and as a consequence heralded the emergence of the Fifth Republic of Venezuela. First, the government was unable to manage the economic affairs of the nation and prevent catastrophic events such as Black Friday, when the currency was devalued for the first time in over two decades and El Caracazo, which saw protests on the streets of Caracas violently quashed by the military. These occurrences led to a loss of government and elite legitimacy among large sections of the population. Second, this loss of legitimacy was not just felt at a civil level but extended to members of the armed forces. In the early 1990s, the Pérez administration's failure to continue a policy of appeasement towards the armed forces resulted in military challenges to the regime and further highlighted the failings of the administration to even greater sections of the public. Finally, the destruction of the longstanding and elite-dominated two party-system created a vacuum in which candidates from newly established political parties could successfully campaign for a seat in parliament. The combination of these three issues culminated in the election of Hugo Chávez in 1998 and signalled a new era in Venezuelan politics in which the economic elite's ability to determine state policy-making was under severe threat.

The first phase of the Fifth Republic (1999–2004)

Hugo Chávez assumed the presidency of Venezuela on 2 February 1999 and immediately began to implement new domestic policies aimed at bringing about a total political transformation in Venezuela, one in which the state would come to dominate society. In his inaugural speech Chávez (1999, p. 1) articulated his vision of the need for radical change in the Venezuelan political system when he stated: 'We are being called to save Venezuela from this immense and putrid swamp in which we have been sunk during 40 years of demagoguery and corruption'. In April 1999, his first key strategy was to propose a referendum on the creation of a National Constituent Assembly (*Asamblea Nacional Constituyente* [ANC]) and to draft a law for the election of ANC delegates (Coppedge 2002). The ANC's main purpose was to write a new constitution for the Fifth Republic of Venezuela based on the outcome of a consultative process with various representatives of Venezuelan society. Following the ANC elections, Chávez outlined 'an arrangement of "cohabitation" in which

Congress agreed to cooperate with the ANC and in return was allowed to hold sessions' (Ellner 2001, p. 13). In doing so, Chávez proposed that the assembly's powers should extend to the right to dissolve Congress and the Supreme Court in the event that the two state apparatuses should become obstacles to the intended overhaul of Venezuela's political architecture.

Following the ratification of the draft constitution on 15 December 1999, the National Constituent Assembly instated a Public Power Transition Regime that disbanded Congress and the Supreme Court. In its place the Assembly appointed an Ombudsman, Public Prosecutor, Comptroller, and the board of the National Electoral Council (Coppedge 2002). The National Constituent Assembly also provided for itself to be succeeded (until new elections could be held in July 2000) by a National Legislative Committee consisting of 11 ANC members and 10 unelected members appointed by the ANC. During its short tenure, the new committee was given extensive powers and authority, which extended to the authority to remove elected officials at the state and local level. 'By the time the ANC ended its functions, there was not a single national power, other than President Chávez himself, that had not been appointed by a body that was 93 per cent Chávista' (Coppedge 2002, p. 31). Elite control over policy-making had been eliminated, at least for the moment.

Now, the Chávez government focused on preparing for the 'mega-elections' of 30 July 2000 in which candidates would stand for election to the new unicameral parliament, the *Asamblea Nacional* (National Assembly), while simultaneously Chávez would run in the first presidential election under the new constitution. At the time, the results of the 'mega-elections' were perceived to be the litmus test for the success of the revolution and Chávez's vision of Venezuela inspired by the writings of the nineteenth-century Latin American revolutionary leader, Simón Bolívar. In both elections, Chávez and his political coalition emerged victorious with considerable majorities over opposition candidates. While initially these 'mega-elections' appeared to legitimate Chávez's consolidation of power within the new constitutional framework, there was still substantial opposition from the elite and societal interests that had benefited from the distributive policies of the Fourth Republic.

In November 2000, the National Assembly passed an enabling law that approved extending temporary power of 'rule by decree' for a period of one year to President Chávez. However, not until near the end of the period in 2001 did Chávez rush through 49 different laws aimed at furthering the objectives of the Bolivarian Revolution. The approval of the enabling law was the catalyst for the opposition's rapid mobilisation against the Chávez government in what Corrales and Penfold (2007, p. 102) have described as:

a kind of allergic reaction in the body politic: business and labour groups, civil society organisations, and political parties both old and new began to promote national protests, including a two-day civil stoppage in December 2001.

An unusual alliance was formed between Carlos Ortega, the leader of the nation's most influential trade union federation, CTV (Confederation of Venezuelan Workers) and Pedro Carmona, the head of the FEDECAMARAS (Federation of Chambers of Commerce and Manufacturers' Associations), the nation's leading business association. The unexpected alliance and rapid mobilisation of both power

groups was a direct consequence of President Chávez's decision on 6 April 2002 to publicly sack seven senior officials from the state oil company PDVSA (Encarnación 2002). Exacerbating the situation further was President Chávez's announcement of the sackings on his television programme *Aló Presidente*. After publicly naming each fired individual, Chávez humiliated the former employees by blowing a whistle, followed by an exclamation in English of 'offside', thus making a parody of a referee's decision in a football match (*Aló Presidente* 2002, No. 101).

On the morning of 11 April 2002, opposition protestors gathered together to begin their march through Caracas to the headquarters of PDVSA as a sign of support for the company's recently dismissed executives. At the same time and in response to media promotion of the opposition march, a pro-Chávez rally was being held near the presidential palace (*Palacio de Miraflores*) in downtown Caracas. An unexpected turn of events occurred when organisers of the opposition group decided to reroute their march's final destination from the headquarters of PDVSA to the presidential palace.

For several hours violent clashes occurred between pro-Chávez supporters, anti-Chávez supporters, the police, members of the National Guard and some military soldiers. Much of the violence was filmed and broadcast across the private television channels in Venezuela and around the world. On the evening of 11 April, several officers from the military high command entered the presidential palace in order to begin discussions with Chávez to negotiate his resignation (Bartley and O'Briain 2003). A dawn deadline had been given for Chávez and his government to peacefully and unequivocally resign or an aerial bombardment of the presidential palace would commence. Just before dawn, President Chávez was escorted out of *Miraflores*. It seemed as though his efforts to consolidate state power and overcome societal interest groups had failed. The following morning, Pedro Carmona appeared on Venezuelan media channels, announcing that Chávez had resigned and was in the custody of the military. He further stated that an interim government would be immediately established. In the evening of 12 April, Pedro Carmona again appeared on television to be formally sworn in as president of the interim government (Bartley and O'Briain 2003). Following this announcement, the newly appointed Attorney General proceeded to dissolve the political, judicial, legislative and administrative institutions established by the Chávez government.

Despite the private media's blackout, news of Chávez's captivity and refusal to resign had begun to circulate in Venezuela. On the morning of 13 April, a large number of Chavez's supporters took to the streets to protest the actions of the armed forces and the interim government. Many protestors surrounded the presidential palace in order to apply further pressure on the newly installed administration. This public display of support was relayed to many of the deposed cabinet ministers who had gone into hiding after the forced removal of Chávez. Events then took an extraordinary turn: 'By the next morning, both pro- and anti-Chávez military leaders were working together to remove Carmona and replace him with Chávez's vice president, Diosdado Cabello, who had come out of hiding' (Nelson 2006, p. 9). Due to the combined efforts of a broad section of Venezuelan society that included citizens, government and military officials, the coup of 11 April 2002 lasted only 72 hours before constitutional democracy and a democratically elected government were reinstated. Ironically, people power had given Chávez a further opportunity to establish the supremacy of the state over society.

The events of 11–13 April 2002 presented both great challenges and opportunities for Chávez and his government. The initial success of the coup revealed Chávez's reduced capacity to influence and control sections of the Venezuelan armed forces as well as the determination of many opposition groups to conspire against the government in order to bring about its demise by any means. However, the events also showed that, as Nelson (2006, p. 9) noted:

For Hugo Chávez, the coup was a boon. It reinvigorated his presidency and helped him further consolidate power. During the crisis, all the masks came off. When he returned to office, he knew exactly who was with him and who was against him.

In the weeks following Chávez's return to power, around 40 distinct opposition groups formed a loose coalition under the banner of *Coordinadora Democrática* (CD) (Democratic Coordinator) (Mainwaring and Scully 2009, p. 152). The CD began to concentrate on campaigning for a national recall referendum on Hugo Chávez's presidency, as prescribed in Article 72 of the 1999 Venezuelan Constitution. In accordance with Article 72 of the Constitution, a binding referendum to revoke his mandate as president could only occur after the midway point of his term, in this case, August 2003. In response to the delayed deadline for the recall referendum and in an attempt to apply pressure on President Chavez to agree to an early non-binding referendum, the CD organised a general strike that began in early December 2002 and continued until early February 2003. The general strike drastically reduced Venezuela's oil exports over the two-month period and consequently disrupted the economy.

In retaliation against the strike and in a bid to gain control of the renegade oil company, the Chávez government sacked approximately 18,000 PDVSA employees, specifically targeting upper and middle management as well as highly skilled technicians (Kelly and Palma 2004). While Chávez and his government had survived the effects of the oil lockout and achieved a rapid and fundamental cultural change within the state-run oil company, they were still unable to completely dismantle the opposition's influence on large sections of the population and to avoid a presidential recall referendum. Societal power was still able to foil Chávez's plans for state domination over society.

On 3 June 2004, the National Electoral Council announced that enough signatures had been collected to validate a recall referendum and declared it would be held on 15 August 2004. On the day of the recall referendum, just fewer than 10 million registered voters cast their votes. The final results were 59.0958% of votes in favour of Chávez and 40.6393% against (Carter Center 2005). Chávez had met yet another challenge to his presidency and survived. His successful defeat of the recall referendum signalled that after almost five years of struggles and direct challenges to the legitimacy of his government, President Chávez had finally achieved a clear and convincing consolidation of political authority. Chávez had not only legitimised his government but had also secured the ascendancy of state power over societal power.

In the months following the August 2004 recall referendum the Chávez government began a review of the future direction of the Bolivarian Revolution. His decisive win clearly demonstrated that after five years, his Bolivarian Revolution had achieved a consolidation of power and mandate from the majority of Venezuelans. In particular President Chávez began to promote the need for a

complete overhaul of the Venezuelan Ministry of Foreign Affairs (Maduro 2006). These changes included the reassignment of diplomats who began their careers during the Fourth Republic and new appointments to senior positions in the ministry for candidates with strong ties and direct participation in the movement that founded the Bolivarian revolution and its political party.

During the first phase of the Fifth Republic, a radical tone had begun to emerge in the Chávez government's approach to policy-making. However, implementing radical policies had most often been held in abeyance as politics in Venezuela had focused more on the efforts of Chávez to consolidate his power and the conflicts that these struggles generated. Despite the activities of the opposition, Chávez emerged from the tumultuous first five years with greater power and legitimacy, ready to build on the policies already in place at home and to venture into new initiatives abroad. Furthermore, the nature of policy-making had been dramatically altered. The comfortable elite accommodation of the *Punto Fijo* years has been swept aside and replaced by a system in which the state and especially the president were increasingly the focal points of policy-making and where countervailing forces in society were greatly weakened.

The second phase of the Fifth Republic (2005–2010)

The second phase of the Fifth Republic of Venezuela witnessed a shift from a preoccupation with domestic matters to a strong focus on foreign policy issues at both regional and international level. This was possible because the state had attained a degree of autonomy that enabled its officials to determine foreign policy priorities independent of societal interests. During this period, President Hugo Chávez sought to redefine Venezuela's role in the international system through an assertive and at times uncompromising approach to foreign policy-making. This generated both positive and negative responses from members of the international community and transformed the traditional process and content of foreign policy in Venezuela. At a conference held in November 2004, President Hugo Chávez presented the 'new strategic map' for Venezuela and formally introduced the concept of *el mundo multipolar* (multipolar world) (Chávez in BGV 2004, p. 24). This was an original conception and not foreign policy ideas transferred from the president's new international friends. Previously, President Chávez had alluded to this concept and loosely linked it to Venezuela's foreign policy model, but it was not until 2004 that a coherent explanation was presented to the Venezuelan public. His conceptualisation of a 'multipolar world' identified five regions he considered to be the main poles of global power. These power groupings were the continents of Africa, Asia, Europe and two in the Americas; namely North America and South America. Chávez's concept of a multipolar world was aimed at strengthening Venezuela's sovereignty in the international community by consolidating, and diversifying Venezuela's foreign and economic relations through direct and intensified diplomatic engagement.

The *Alternativa Bolivariana para las Américas* (ALBA; Bolivarian Alternative [Alliance] for the Americas) was an economic trade and development bloc that formed the first key piece of foreign policy implemented in the second phase of the Fifth Republic. The impetus for the creation of an alternative trade bloc can be traced back to two key events. Firstly, the success of Cuban medical assistance during the 1999 flood crisis in Caracas provided the foundation for the close and supportive

engagement between Venezuelan and Cuba based on a policy of complementary assistance. Second, the failure of the proposed Free Trade Area of the Americas (FTAA) in 2003 revealed a changing tide in Latin American acceptance of traditional models of economic and human development. In its infancy, ALBA began as a simple bilateral exchange of resources between Cuba and Venezuela. In late 2004, Cuba and Venezuela formally signed the first agreement under ALBA's new framework, which saw approximately 20,000 Cuban doctors sent to work in Venezuela in exchange for heavily subsidised Venezuelan petroleum. But ALBA's mission went further, as Harris and Azzi (2006, p. 6) explained:

The Bolivarian Alternative for the Americas includes promotion of trade between countries, and even the elimination of tariff barriers on certain products, but its core purpose goes far beyond this. The explicit aim of ALBA is to promote the 'social' side of development, eliminating poverty and combating social exclusion in a cooperative effort by Latin American nations.

This Bolivarian focus on social development from an endogenous Latin American base has manifested into a system that incorporates exchanges between member states in a non-traditional way, at times similar to a bartering system. This approach is designed to foster regional development and to involve countries that ordinarily would not be able to participate in trade based on a traditional monetary exchange for goods. ALBA has rapidly evolved into an increasingly influential power bloc in the region that rejects neo-liberal approaches to development. The establishment and growth of ALBA fits the model of a multipolar world in which Chávez and the Venezuelan state are actively pursuing alternative development strategies that support regional integration and challenge the status quo.

In contrast to the positive reception that innovative initiatives such as ALBA have received, other elements of contemporary Venezuelan foreign policy have proven to be divisive in nature. This is largely due to the changing nature of foreign policy-making during this period, which has evolved into a complex state-centred process that is largely determined by decisions made according to the attitudes and reactions of President Chávez. A considerable portion of foreign policy-making is undertaken directly by the President in a reactive manner that at times threatens the continuity of Venezuelan foreign policy and adherence to the multipolar framework. The recent strained relations between Venezuela and Colombia provide an important example of this radical and personalistic foreign policy decision-making.

Historically, the relationship between Venezuela and Colombia has been a complex one that oscillated from cooperation, particularly in economic and trade matters, to turbulence and at times antagonistic exchanges. During the Fifth Republic, relations between the two countries deteriorated on several occasions to the point where both nations threatened to prepare for war. Venezuelan foreign policy during this period increasingly moved towards a model of policy-making that was largely state-centred and formulated directly and in most cases solely by President Chávez. It was a reactive mode of policy-making, driven by the President's own ideological distinction of 'left' and 'right' politics in Latin America, with Venezuela representing the 'left' and Colombia the 'right'.

Colombia's close and supportive alliance with the US and its foreign policy in the region have become divisive factors in Colombia–Venezuela relations. Colombia's acceptance and reliance on the United States for foreign aid led to the general acceptance by Colombian President Uribe of US foreign policy in the region and conflicted with Chávez's pursuit of a Latin America based on regional solidarity and independence from US influence. The 2008 Colombia–Ecuador crisis provides an example of recent relations between the two nations as well as Venezuela's radical approach to foreign policy issues relating to Colombia, and indirectly towards the United States.

The 2008 Colombia–Ecuador crisis began on 1 March 2008 when the Colombian military breached Ecuadorian territorial sovereignty while pursuing members of the *Fuerzas Armadas Revolucionarias de Colombia* (FARC; Revolutionary Armed Forces of Colombia), believed to have crossed over the border between the two nations. The Colombian military carried out an aerial bombardment of an area believed to be a training camp of FARC within Ecuador. The Colombian government confirmed that 16 suspected FARC members had been killed in the attack, including the head of the FARC, Raul Reyes. The Ecuadorian government responded by expelling the Colombian ambassador and diplomatic staff, censuring Colombia at an emergency meeting of the Organization of American States (OAS) and mobilising troops to the border.

On 2 March 2008, in support of Ecuador's response to the incident, President Chávez addressed the Venezuelan population on his television programme *Aló Presidente* discrediting President Uribe:

I am saying Alvaro Uribe can be the head of the Mafia, but never president of a country. A gangster cannot be president and even less so in a South American country and a brother country. President Uribe is a criminal, a criminal; not only is he that, he is a lying one, a gangster one, a paramilitary one and he directs a narco-government. He is a government footman of the North American Empire, a subordinate of Bush. Uribe does whatever Bush commands to him to do. He directs a band of criminals. (*Aló Presidente* 2008, No. 306)

During his televised speech President Chávez continued to berate President Uribe and his ministers, frequently describing them as a band of criminals. He further recalled all Venezuelan diplomatic staff from Colombia and broke off ties with the Colombian government calling for the closure of the Venezuelan Embassy in Bogotá, the Colombian capital (BGV 2008). President Chávez also ordered the mobilisation of Venezuelan troops to the border with Colombia 'to prevent similar situations occurring and to secure and protect Venezuela's sovereignty' (BGV 2008). President Chávez unequivocally articulated Venezuela's policy response to the conflict:

I said to him [Correa]: 'You can count on Venezuela under any circumstance'. 'Minister of Defence, move ten battalions towards the border with Colombia, immediately'. We do not want war, but we are not going to allow to the North American Empire, that is the master, and to its puppy President Uribe and the Colombian oligarchy, which come to divide to us, who come to debilitate us. We are not going to allow it. I order immediately the retirement of all our personnel from the embassy in Bogotá. 'Chancellor Nicholas Maduro, close the embassy in Bogotá and recall all the civil servants who are there'. We are ready for combat and on alert. I put Venezuela on alert and we will support Ecuador in any circumstance. (*Aló Presidente* 2008, No. 306)

Following Chávez's spontaneous policy announcement, on 3 March, Foreign Minister Nicolás Maduro informed the Venezuelan National Assembly of the government's political and military response to the crisis including the expulsion of all Colombian diplomatic staff from Venezuela (BGV 2008).

President Chávez's speech contained critical elements that reveal the way in which foreign policy-making was undertaken and formulated in the second phase of the Fifth Republic of Venezuela. Firstly, President Chávez's decision to unequivocally and immediately support Ecuador's position demonstrates Venezuela's commitment to 'Latin American solidarity' in times of crises. This notion of regional solidarity is based on ensuring a strong and powerful Latin American bloc of countries independent and resistant to the interests of hegemonic actors in the Western Hemisphere. In this case, Colombia's actions were perceived to be partially representative of the overarching agenda of the United States in the region. The Venezuelan government classified Colombia's incursion as corresponding with the objectives of Plan Colombia, a joint US–Colombia counter-narco-terrorist initiative, which Venezuela considered a serious threat to all countries neighbouring Colombia (BGV 3 March 2008). Secondly, Chávez's immediate response was manifested in the rapid implementation of policies that were reactive in nature and that held the potential to escalate rather than temper the situation. Furthermore, as was shown in his speech on *Aló Presidente*, President Chávez at times dictates Venezuelan foreign policy without consultation with ministers of the relevant portfolios. In these circumstances, the ministers act as implementers of foreign policy rather than specialists who advise the President on policy issues. Finally, this can result in a policy-making process that is largely determined by the president's own personal perception of issues in the international system rather than those of his party and government. This personalised approach to policy-making delivers dynamic, radical and at times inflammatory policy choices and outcomes as demonstrated during the 2008 Colombia–Ecuador crisis. This radical approach to foreign policy-making can also be found in recent US–Venezuelan relations.

The US–Venezuelan relationship during the Fifth Republic provides one of the most important examples of the emergence of radical policy in Venezuela and the subsequent radical outcomes that derive from this unique 'Bolivarian approach' to policy-making, particularly in foreign policy. When Chávez came to power in 1999, Venezuelan relations with the United States appeared set to remain on cautious but stable terms, especially in economic and trade matters (Ellner 2008). At the beginning of Chávez's first year in power, the United States received 50% of Venezuelan exports and US products accounted for approximately 45% of Venezuelan imports (Romero 2006, p. 137). Even though economic relations appeared to be cooperative, early on President Chávez began to voice suspicions of US foreign policy, primarily based on Latin America's experience of the United States' past uncompromising unilateral approach to the region during the Cold War.

Initially, President Chávez had sought to moderate US influence in Venezuela while at the same time continuing 'cordial relations within a climate of selective cooperation and mutual respect' (Romero 2006, p. 139). That changed with the departure of President Clinton and the election of the Republican, George W. Bush, to the White House and the unforeseen events of 11 September 2001. The latter altered the foreign policy objectives for many nations in the international community

and changed the way in which governments prioritised threats to national security. The United States underwent a complete shift in foreign policy to focus on the War on Terror and consequently altered its policy priorities in Latin America.

Under the Bush administration, and despite concerns from several Latin American nations, foreign aid to Colombia increased (Isacson *et al.* 2004). The majority of development aid was in the form of direct military assistance, which led to an increase in the presence of US military personnel in the region (CIP 2004). Doubts began to emerge over the true objectives of Plan Colombia, and President Chávez in particular began to publicly express views on the dubious nature of the global War on Terror. Debate on the subject centred on the altered objectives of US foreign policy in the region. Moreover, much of the criticism directly challenged the motives of US involvement in Plan Colombia.

Under the backdrop of increased US military, economic and political presence in Latin America, Venezuelan relations with the United States deteriorated steadily during the Fifth Republic. Although the United States consistently denied any involvement or participation in the April 2002 coup, its admission of meetings with several coup plotters provided the platform on which President Chávez could begin to create a foreign policy towards the United States that bore similarity to the cold war dichotomy of communism versus capitalism. Lapper (2006) has observed that the rapid deterioration of relations between the United States under Bush and Venezuela were grounded in the poor policy response of US officials during and following the April 2002 political crisis.

During the Bush administration, President Chávez continued to use different opportunities and media to present a foreign policy aimed at publicly challenging and denouncing US foreign policy both in the Latin American region and further afield. 'In 2003, Chávez began to employ the term *imperialism* to describe the role of Washington in world affairs, and subsequently accused it of committing genocide in the Middle East and warned of a possible invasion of Venezuela' (Ellner 2008, p. 199). The increasingly radical nature of Venezuelan foreign policy was unequivocally demonstrated on 20 September 2006 at the 61st United Nations General Assembly. President Chávez used his address to disparage and berate the United States and President Bush. During his short and now infamous address, President Chávez on several occasions referred to President Bush as the 'devil' and described the chamber as 'smelling of sulphur'.

Another theme that emerged during this period was President Chávez's decision to intermittently threaten and in some cases use the political tool of diplomatic expulsion against the United States. These decisions were not restricted to bilateral disagreements between Venezuela and the United States but at times were taken to support other Latin American nations experiencing strained diplomatic relations with the United States.

An example of this approach to foreign policy was demonstrated during September 2008 when the Bolivian government became engaged in a war of words with the US government. At the centre of the issue were claims made by Bolivian President Evo Morales concerning the inappropriate diplomatic conduct of US Ambassador Phillip Goldberg. President Morales accused Goldberg of conspiring against the Bolivian government with members of the Bolivian opposition and ordered the expulsion of the US Ambassador. A day later, the US government responded by expelling Bolivia's ambassador to the United States. On 11 September

2008, while addressing a rally for the Venezuelan Socialist Party in Caracas, President Chávez was informed of America's decision to expel the Bolivian ambassador. Immediately, President Chávez (2008) issued the following statement:

We have just learnt that the United States has announced the expulsion of the Bolivian ambassador from its territory. From this moment we have begun to review our diplomatic relations with the government of the United States. I have just spoken with the Chancellor [Nicolás Maduro] about the situation and so that Bolivia knows that it is not alone, from this moment the Yankee ambassador has 72 hours to leave Venezuela. In solidarity with Bolivia, its people and its government! Mr Chancellor, bring back our ambassador from America before they have a chance to boot him out. . . . When the United States has a new government we will send a new ambassador . . . when there is a government that has respect for the Latin American people and Simón Bolívar's America!

This radical policy decision to unequivocally join Bolivia in expelling senior US diplomats demonstrates Venezuela's foreign policy commitment to the concept of Latin American solidarity as well as a staunch rejection of US influence in the region. President Chávez's announcement during the rally also disclosed a key issue regarding the nature and process of policy-making in the second phase of the Fifth Republic. In certain situations and with particular reference to foreign policy-making, the action begins and ends with President Chávez and is largely determined by his own personal assessment of the situation at hand. Accordingly, the Venezuelan response to conflict situations manifests in emotive, inconsistent and often dramatic policy decisions. So long as President Chávez remains as the unchecked sole policy-maker on foreign affairs, Venezuela will continue to present a radical foreign policy seemingly driven by a personal and sometimes erratic agenda. Importantly, while much of President Chávez's foreign policy announcements in relation to the United States can be provocative and even defamatory in nature, they rarely result in policy outcomes that threaten or even change Venezuela's overarching national economic interests.

Explaining radical change

We now turn to the task of identifying the approach to policy-making that best explains foreign policy-making in Venezuela, especially the radical changes that took place under the presidency of Hugo Chávez. The major finding is that no single model can provide complete explanation for foreign policy-making in the Fourth and Fifth Republics of Venezuela. Rather we must use several models to account for events in Venezuela over this period.

The policy transfer approach is the least useful framework for gaining analytical insight into foreign policy-making in Venezuela, especially the radical changes to that policy. This is because there has been so little direct foreign policy transfer to Venezuela from other places. While President Chávez has enjoyed a long-standing and close relationship with President Fidel Castro of Cuba and frequently talks of 'socialism' this does not mean that he has imported items from the Cuban system. Indeed there is no evidence of such imports. Where the views of the two men coincide, the origins of these views can be quite different. President Chávez takes his inspiration from the nineteenth-century Latin America revolutionary leader, Simón

Bolívar, and not Karl Marx. Bolívar wrote on socialism, pan-Americanism and anti-imperialism, themes that have been picked up by President Chávez more than a century later. Chávez has resurrected and reinterpreted Bolívar's ideas for the present using them to direct and legitimate his foreign policy. Thus, we can perhaps see a temporal policy transfer within Venezuela from the nineteenth century to the twenty-first century with Chávez 'reinventing the legacy of Simón Bolívar for a modern audience' (McCarthy-Jones 2010, p. 182). But there has been no geographical transfer of foreign policy ideas.

This leaves us with society- and state-centred approaches to furnish convincing explanations of Venezuelan foreign policy-making. Society-centred explanations of policy-making provide the best insight into the Venezuelan policy process during the period of the Fourth Republic of Venezuela. Pluralism is an inappropriate society-centred framework as it assumes a form of liberal democracy that has never existed in Venezuela. Rather it is the class analytic approach with elements of the public choice approach that facilitate our understanding of foreign policy-making under the *Punto Fijo* arrangements. They point to policy choice being the product of elite desire to maintain the status quo. Policy elites representing their own societal interests dominated the policy process, resulting in policies that were favourable to a small section of Venezuelan society as well as foreign interests in Venezuela such as the PDVSA and US-owned oil companies. Actual or potential powerful forces in society and state, the veto players, were bought off by the elite assuring the maintenance of a foreign policy that privileged American interests and the domestic elites. However, the *Punto Fijo* system's inability to adapt to changing circumstances spelled its downfall and saw the emergence of Hugo Chávez. He was swept into power on a wave of popular support based on his political campaign that promised a complete and fundamental rejection of the traditional model of elite democracy and politics in Venezuela.

Under the Chávez government, policy-making in Venezuela has become less easily explained through society-centred models. It is to state-centred models of policy-making that we must turn in order to understand events during the Fifth Republic. Since Chávez's election in 1998, Venezuela has undergone a complete transformation that has redefined the role of the Venezuelan state in domestic, regional and international affairs. For more than a decade, the Chávez government has worked incrementally to restructure Venezuela's political system to provide a stronger and more prominent role for the state and even more so for the position of president. The government also began to target certain classes and interests that had previously dominated or contributed to decision-making during the Fourth Republic. Chávez's strategy aimed at neutralising these actual or potential veto players and enforcing state dominance over society. Although the Chávez government encountered considerable opposition to these moves, by the end of the first phase of the Fifth Republic President Chávez had successfully overcome multiple challenges to his presidency and achieved a domestic consolidation of power. With veto players gone, radical changes to foreign policy-making could commence.

The question arises as to which of the state-centred approaches to policy-making is most appropriate for explaining these events, both the transformation of the policy-making process and the radical policies emerging from the process. The bureaucratic politics approach is unsuitable as it assumes that policy is the outcome of interactions or competition between different players within the state. But Chávez

has succeeded in sidelining divergent opinions within the state and removing any person or group that might be construed as a veto player. He has succeeded in monopolising policy-making power and chooses, seemingly without opposition, the priorities in foreign policy and the particular policies in which he will actively engage. Variants of the rational policy-making models are similarly ill-equipped to provide insight into foreign policy-making in the Fifth Republic as they assume incremental changes and a process of ‘muddling through’ rather than the bold strides taken by President Chávez.

This leaves the state interests approach as best fit. It acknowledges that the state can achieve a level of autonomy or a dominance over society that enables its officials to determine policies that they conceive to be in the national interest. The state decides what the policy problems are and how they should be addressed. This matches the Venezuelan experience of foreign policy-making during the Fifth Republic. However, there is a particular twist to the Venezuelan case in the person of President Chávez. In contemporary Venezuelan foreign policy-making, President Chávez has exerted varying levels of influence based on his personal appraisal of the issue at hand. When situations arise that are of personal importance, Hugo Chávez has shown a propensity to transcend his role as president and act as the embodiment of the state in policy matters. For example, during the 2008 Colombia–Ecuador crisis and recent US–Venezuelan relations, the President personally and without consultation made all the decisions for Venezuela’s foreign policy responses. In these circumstances, the standard state interests model of policy-making cannot entirely account for these features of the policy-making process. This is primarily due to the assumption that within this and alternative state-centred explanations, there will always be other state actors present and contributing to the process of policy formation and policy outcomes. In some of Venezuela’s radical policy initiatives under President Chávez this is simply not the case. A novel element, personalised and centralised power, must be inserted into the state interests model.

Conclusion

The major lesson of this research is that when attempting to explain radical changes to the policy process and policy content it may be necessary to recruit several explanatory models to gain full understanding of events. While one policy-making model may be appropriate for a particular set of circumstances, it might provide far less insight when those circumstances change. Thus, for Venezuelan foreign policy-making in the Fourth Republic, society-centred frameworks of the policy process, especially the class analytical model, provide the greatest understanding. But they are less useful when examining the radical changes to the policy process and policy content that occurred during the Fifth Republic of President Hugo Chávez. A state-centred approach provides the best returns. But not all state-centred approaches are useful. Indeed for the Venezuelan case, it was the state interests variant that provided the solid foundations for productive analysis. Even this could not provide a total explanation and it was necessary to be creative and add novel elements such as the notion of veto players and the ability of President Chávez to secure extraordinary personal control over the foreign policy-making process and content. This case clearly demonstrates that ‘unruly evidence provides complexities that individual policy-making frameworks cannot accommodate’ (McCarthy-Jones 2010, p. 197).

This may well be a lesson that is applicable to other developing countries that also have their own complexities that make their policy-making experiences unamenable to the application of single models for explaining policy processes and outcomes.

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