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Jaiya McMillan

Professor Nunez

What is a Nation?

16 December 2019

Rejecting Bolivarianism: Political Power in South America

By the time he was 36, Simon Bolivar had freed six countries from Spanish rule, often fighting armies of thousands with a couple hundred militia rebels. Bolivar was an incredible military strategist with a liberal approach, and went on to govern both Peru, and then-Gran Colombia, which was made up of modern-day Colombia and Venezuela. After his death in 1830, each of the countries he liberated mourned his loss, and in the almost two centuries since then, leaders have constantly used his name in order to revive his spirit and bolster their own political agendas. One such example is the former Venezuelan president Hugo Chavez, who governed as a dictator of a socialist federation from 1999 to 2013. During that time, he transformed Venezuela from a democratic country to a democratic-socialist one. In this transformation, Chavez utilized a new subset of socialism called Bolivarianism, made up of militarism (expanding military to protect state interests) and democratic-socialism (political democracy with a state-owned economy). By diving deeper into this unique form of socialism, we can further explore if Simon Bolivar would have agreed with, or even recognized Bolivarianism. Based on the extreme limitation of freedom and vastly different economic policies under Chavez, I argue that Bolivar would have rejected this form of socialism.

Many events in Simon Bolivar's early life shaped the way he governed and how his political ideology developed. He was born in 1783 to a wealthy aristocratic family in Caracas, Venezuela. By the time he was nine, both of his parents had died from tuberculosis, so he was

sent to live with various uncles across Venezuela.¹ Each of his uncles would assign him a tutor to teach the young Bolivar about the world around him, however, while he was living with his uncle Carlos Palacio, he learned from Simon Rodriguez, a philosopher who introduced him to the works of Rousseau and other Enlightenment thinkers.² It was at this time Bolivar ran away from home, however, it would not be the last time he met with Rodriguez.³ When his uncle found him a week later, he was promptly enrolled in an elite Venezuelan school, no longer free to roam around as he pleased. It was this experience that pushed him to enroll as a cadet in the White Volunteers of the Valley of Aragua, an elite militia corps. He joined when he was only 14, and only spent a year in its service, but it was a deeply formative experience and influenced his later military strategy. When he was 17, he was sent to live with another uncle, Esteban Palacios, in Spain. Here, his social skills and political identity truly began to take form. During his time in Spain, he also met his wife, Maria Teresa Rodriguez del Toro y Alayza. They married in 1801, but she died of fever just 8 months later. In his grief, Bolivar escaped to Paris to distract himself with the philosophical wonders developing in his world.⁴

In Paris, Bolivar had huge political and philosophical growth. It was here that he eventually reconnected with his old tutor, Simon Rodriguez. When the two met again in a small Parisian cafe, they talked for hours about the changing world and new ideas of freedom developing across Europe because of the Enlightenment.⁵ Throughout the years Bolivar spent in Paris, Rodriguez and the Enlightenment movement convinced him of many things. This was truly Bolivar's start as a nationalist thinker, especially because of the world's changing notions

¹ John Lynch, *Simon Bolivar: A Life* (New Haven: Yale University Press, 2006), 7.

² *Ibid.*, 17.

³ Ronald Briggs, *Tropes of Enlightenment in the Age of Bolivar* (Nashville: Vanderbilt University Press, 2010), 5.

⁴ Lynch, *Simon Bolivar*, 17-18.

⁵ Briggs, *Tropes*, 34.

of liberalism. Many of his ideas of natural rights and freedom were derived from John Locke, David Hume, and Nicolas de Caritat marquis de Condorcet, major philosophers in the movement. There were, however, two philosophers in particular that completely changed his worldview.⁶

Both Baron de Montesquieu and Jean Jacques Rousseau opened Bolivar's eyes to the injustices occurring in South America, spurring him to action. His modernizing ideas of government can most clearly be attributed to Montesquieu, a French lawyer and philosopher who advocated for the separation of powers. This was done in order to prevent the consolidation of control in a unitary executive, which, Montesquieu believed, would help protect political liberty.⁷ Bolivar's ideas of freedom, on the other hand, are most directly related to Rousseau.⁸ In his pamphlet, *The Social Contract*, Rousseau argues that man is born good and innocent, and legitimate political authority cannot be found in nature. He concedes that in the modern world, complete freedom is not possible, thus, submission to governance through the social contract is a loss of natural liberty.⁹ These ideas are echoed in Bolivar's *Jamaica Letter*, where he laments the loss of South American personal freedom to a false king in Spain. In one line, he compares this loss to slavery, stating "a people are therefore enslaved when the government, by its nature or its vices, infringes on and usurps the rights of the citizen or subject."¹⁰

Bolivar's time in Europe also revealed his sentiments towards the Atlantic slave trade. In their last days together in Paris, Rodriguez begged him to return to South America and fix the injustices occurring there.¹¹ Bolivar was convinced, and as he sailed back to his home country,

⁶ Briggs, *Tropes*, 5.

⁷ Ibid., 107.

⁸ Ibid., 119.

⁹ Jean Jacques Rousseau, *The Social Contract* (1762), 9.

¹⁰ Simon Bolivar, *The Jamaica Letter*, (1815), 4.

¹¹ Briggs, *Tropes*, 5.

his ship stopped in the United States, a land that he had previously hailed as a focal point for freedom. While he still deeply admired the American political system, upon landing, Bolivar was disgusted with the presence of slaves in this so called 'free' country. This experience cemented his belief that slavery should be abolished and that a new Venezuela should have "sovereignty of the people [...] and prohibition of slavery."¹² With this, Bolivar returned home, freedom on his mind.

Bolivar's campaign for independence began in 1808, as Spain and France fought over the Iberian Peninsula in the Peninsular War. This war left Spain in disarray, as Napoleon captured the previous king and replaced him with his brother, Joseph Bonaparte, for the duration of the war.¹³ The unofficial placement of King Bonaparte angered many South Americans because not only were they being ruled over by someone thousands of miles away, he was also a foreigner. As this unrest spread, Bolivar started to assemble an army. His military experience proved useful, as the revolutionaries won independence for Venezuela in 1821 and established a national congress.¹⁴ He followed this success by liberating Peru, Ecuador, Colombia, and Bolivia (which was named after him). From here, Bolivar unified Colombia, Venezuela, Panama and Ecuador, named it Gran-Colombia, and served as both its and Bolivia's president.¹⁵ Yet while Bolivar was anti-Spanish, he was not fully anti-imperialist. After unifying Gran-Colombia, he hoped to expand to the rest of South America, exerting diplomatic and military force. He eventually gave up his role as president of Bolivia, but served in Gran-Colombia until his death by tuberculosis in 1830.¹⁶

¹² Lynch, *Simon Bolivar*, 29.

¹³ *Ibid.*, 54-55.

¹⁴ *Ibid.*, 122.

¹⁵ *Ibid.*, 154.

¹⁶ Lynch, *Simon Bolivar*, 273.

Hugo Chavez was born in 1954 at the start of the Cold War, a period of tumult between socialism and democracy. He had a difficult relationship with his parents, and instead looked to his grandmother and her neighbor, Jose Esteban Guevara Ruiz. Ruiz was one of the most influential people in Chavez's early life, educating him on Marxist thought, Che Guevara, Rousseau, Machiavelli, and most importantly, Simon Bolivar. Chavez spent most of his time in the Ruiz family library, absorbing all the information he could from the Communist-leaning family.¹⁷ At this point in life, Chavez never subscribed to any "political endeavor" despite the strong Communist presence in his life.¹⁸ After his informal education in the Ruiz household, Chavez left for the military, joining the Venezuela School of Military Sciences. It was here that his political ideology truly began to take hold. He became more fervent in his exaltation of Ezequiel Zamora, the martyr of a mid-19th century peasant insurrection, and Bolivar, studying their practices obsessively in order to emulate them.¹⁹ At this point, Chavez was captivated by the thought of becoming a political leader. He had since graduated from military school, moving up the ranks until being tasked as a Major Commander of the Army. This was a high-ranking position in the military, and he was able to observe the new president, Carlos Andres Perez.²⁰

After 2 months of Perez's presidency, Venezuela was practically in shambles, creating an ideal opportunity for a coup. Perez had an approval rating at 35% and had teachers, students, and doctors striking in opposition of him and his policies. Not only that, the economy was on a slow decline, evidenced by both the inflation rate and the price per barrel of oil, the former of which sat at a high 31%, the latter at \$8 per barrel, the lowest it had been in two decades.²¹ This created

¹⁷ Cristina Marcano and Alberto Barrera Tyszka, *Hugo Chavez*. (New York: Random House, 2004), 5-18

¹⁸ Javier Corrales and Michael Penfold, *Dragon in the Tropics*. (Washington, D.C., The Brookings Institution), 45

¹⁹ Marcano, *Hugo Chavez*, 38

²⁰ *Ibid.*, 42

²¹ Marcano, *Hugo Chavez*, 55, 61

the perfect storm for Chavez to start planning his coup. With his high position in the military, he was in the perfect place to gain loyalty from his fellow soldiers, who promised their support in January of 1992, a month before the coup was scheduled. By the time February rolled around, there were rebel groups who had stormed the capital, setting the stage for Chavez and his army. His coup, however, did not end in success. Instead, he was thrown in jail, but his support did not waver, rather, it grew exponentially. From his cell, he delivered a statement to the press, assuming the responsibility for the “Bolivarian military movement” and telling his supporters to surrender “for now.”²² Absorbing this blame was an unexpected move, and bolstered his support from Venezuelan citizens. People visited his jail cell daily, curious to see who tried to overthrow the president they were so tired of. After 4 months, Chavez was released, and he left to work on creating a new political party to gain power democratically.²³

From 1992 to 1998, Chavez stayed out of the public eye, preparing to run for the presidency in 1999. During this time, Chavez released a book entitled *The Blue Book: The Tree with Three Roots*. In it, he describes the motivation for his coup, where Venezuela’s power comes from, and “the subconscious of the national self.”²⁴ The most important of these points is the foundation of Venezuelan might, which Chavez claimed came from three roots: Simon Bolivar, Simon Rodriguez, and Ezequiel Zamora. By the time Chavez announced his ticket in 1999, practically the entire nation had read his book, and was excited for his candidacy. During his presidency, Chavez accomplished much more than Perez, the previous president, but one of the biggest changes to Venezuela was its name.²⁵ In 1999, he changed the name from Venezuela to the Bolivarian Republic of Venezuela, showing his dedication to his idol. Not only that, the

²² Ibid., 68

²³ Ibid., 87

²⁴ Ibid., 98

²⁵ Corrales, *Dragon in the Tropics*, 13

people believed he was a successful president. In his life, he only lost one national election, which shows that Venezuela believed in him.²⁶

While Chavez had many political achievements, some of which included transforming the economy to increasing national literacy, perhaps his greatest feat was revitalizing the Cult of Bolivar. While Bolivar's legacy had long been mythicized, Chavez took his myth to a different degree. In interviews about his childhood, he would say that "instead of Superman" his hero was Bolivar.²⁷ Much of his presidency was dedicated to glorifying and revering Bolivar. It is said that in every cabinet meeting, he would leave an empty chair for "El Libertador", claiming it would enlighten them as they planned. Chavez completely reinvigorated the so-called Cult of Bolivar, going so far as renaming the country and its constitution to include his name.²⁸ By attaching the 'Father of South America' to his political career, Chavez was able to claim he was fulfilling Bolivar's legacy. Such was the example with Bolivarianism, the hybrid-socialism Chavez used. He altered Bolivarianism in some ways by incorporating ideas from Noam Chomsky, Fidel Castro, and Che Guevara, all well known socialists. Bolivarianism was a form of democratic-socialism, or political democracy with a state-owned economy, from the start.²⁹ Chavez's interpretation also incorporated militarism, or expanding the military to protect state interests.

While Bolivar may have been the hero of Chavez's childhood, the two Venezuelan leaders share just as many differences as similarities. With displacement in childhood, both men rose above the odds and received quality education. However, the difference is that Bolivar was raised with much more wealth than Chavez, so as a leader, he was less focused on issues of class, whereas it was a pressing issue for Chavez. From these educations, they both learned about

²⁶ Marcano, *Hugo Chavez*, 102

²⁷ *Ibid.*, 92

²⁸ *Ibid.*, 102

²⁹ Corrales, *Dragon in the Tropics*, 58.

famous Enlightenment thinkers such as Rousseau, however, Chavez also had influence from socialists and communists, possibly impacting his different style of leadership.

If Bolivarianism is defined by Hugo Chavez himself as an anti-imperialist participative democracy, then this must be the standard used in evaluating if Bolivar would have approved of this political ideal. As he died before Karl Marx's Communist Manifesto was published in 1848, it's difficult to definitively prove that Bolivar would have rejected it on site, as both Communism and socialism are large departures from previous political theories. He might have even agreed with democratic-socialism, a core aspect of Bolivarianism, but because of Chavez's use of militarism as well as the application of Bolivarianism, it is clear that Bolivar would reject this theory. Not only that, other leaders who heavily influenced Chavez hated Simon Bolivar, particularly Karl Marx.³⁰ In 1850, Marx wrote an encyclopedia entry about Bolivar, and his bias against him was clear through the entry. Later, when asked about this bias, Marx made it clear that he believed Bolivar only weakened the revolutionary movement, and was too blinded by his own ego to truly help his constituents.³¹ Bolivar was a known proponent of the American political system, which he said was one of the "best in the world."³² This makes it confusing as to why Chavez revered him so much, especially as a vocal critic of the United States. It is also interesting to see how he used Bolivar's anti-Spanish sentiments as anti-imperialist to fit his anti-American needs. As I stated earlier, Bolivar agreed with some aspects of imperialism, which is something Chavez strongly disagreed with. Ultimately, because of the conflation of truth and differing political theories, Bolivar would have disagreed with Bolivarianism.

³⁰Frederick E. Pike, "Caudillismo, Good and Bad," in *The Modern History of Peru*, ed. R.A. Humpreys and John Lynch (New York: Praeger Inc. Publishers, 1969), 74.

³¹ Pike, *Caudillismo*, 78.

³² Lynch, *Simon Bolivar*, 22.

Simon Bolivar, the great fearless leader known as “the Liberator” was inspiration for many after his death in 1830, so what was so special about Hugo Chavez’s admiration? Chavez reconstructed an entire country which he claimed was in honor of Bolivar, however, how could this be true when their ideals were so different, even conflicting at times? The simple conclusion is that while Chavez appreciated the work Bolivar did to liberate South America from Spain’s control, he did not emulate it in the same sense by creating Bolivarianism. It is ultimately clear that Simon Bolivar would have rejected Bolivariansim.

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