

METAPHORS IN HUGO CHÁVEZ'S POLITICAL DISCOURSE:
CONCEPTUALIZING NATION, REVOLUTION, AND OPPOSITION

by

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A dissertation submitted to the Graduate Faculty in Hispanic and Luso-Brazilian
Literatures and Languages in partial fulfillment of the requirements for the degree of
Doctor of Philosophy, The City University of New York

2008

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This manuscript has been read and accepted for the Graduate Faculty in Hispanic and Luso-Brazilian Literatures and Languages in satisfaction of the dissertation requirement for the degree of Doctor of Philosophy.

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Abstract

METAPHORS IN HUGO CHÁVEZ'S POLITICAL DISCOURSE:
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This dissertation examines Hugo Chávez's choice of metaphors in his efforts to construct and legitimize his Bolivarian Revolution. It focuses on metaphors drawn from three of the most frequent target domains present in his discourse: the nation, his revolution, and the opposition. The study argues that behind an official discourse of inclusion, Chávez's choice of metaphors contributes to the construction of a polarizing discourse of exclusion in which his political opponents are represented as enemies of the nation.

The study shows that Chávez constructs this polarizing discourse of exclusion by combining metaphors that conceptualize: (a) the nation as a person who has been resurrected by his government, as a person ready to fight for his revolution, or as Chávez's himself; (b) the revolution as war; and (c) members of the opposition as war combatants or criminals. At the same time, the study shows that by making explicit references in his discourse about the revolution as the continuation of Bolívar's wars of independence, Chávez contributes to represent opponents as enemies of the nation, given

that in the Venezuelan collective imaginary Simón Bolívar is the symbol of the nation's emancipation.

This research, which covers a period of nine years (from Chávez's first year in office in 1999 through 2007), is part of the discipline of Political Discourse Analysis (PDA). It is anchored both in the theoretical framework provided by the cognitive linguistic metaphor theory developed by George Lakoff and Mark Johnson described in their book Metaphors We Live By, and in Critical Metaphor Analysis (CMA) as defined by Jonathan Charteris-Black in his book Corpus Approaches to Critical Metaphor Analysis.

The study provides the first comprehensive analysis of metaphors used by Chávez in his political discourse. It builds upon the findings of previous studies on political discourse analysis in Venezuela by showing that Chávez's discourse not only polarizes the country and represents opponents as detractors of national symbols such as Bolívar or his wars of independence (which have been clearly established in previous studies), but also represents political opponents as enemies of the nation.

Foreword

Nunca levantamos muchas salas de teatro en este país. ¿Para qué? La estructura principista del poder fue siempre nuestro mejor escenario.

José Ignacio Cabrujas

Acknowledgments

I would like to thank my adviser, Professor José del Valle, for all his ideas and insightful feedback on this dissertation; and for all his time, commitment and kindness during my doctoral work. I would also like to thank Professor Ricardo Otheguy for having introduced me to linguistics research, and for having inspired me through his own work to conduct a study based on a large corpus of data.

I am very thankful to Professor Lía Schwartz and Professor Isaías Lerner for their continual support and encouragement since the beginning of my doctoral studies. This work would have not been possible without the financial support from the Ph.D. Program in Hispanic and Luso-Brazilian Literatures and Languages in particular, and the CUNY Graduate Center in general. I am especially grateful for the MAGNET Dissertation Fellowship.

I would also like to thank to Dr. Antonio Calvo for having given me the opportunity to teach one more year at Princeton University. Without the facilities and support of the Firestone Library, this work would have not been completed.

Very special thanks to my partner, Lance Lattig, for all his encouragement, support and patience, and especially for the endless hours of discussion and editing. His brilliant mind has helped to shape this work.

Este trabajo está dedicado a mi madre, Carmen Moreno de Aponte, quien con sus infinitos refranes ha despertado en mí este gran interés por las metáforas.

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Chapter 1: Introduction

On February 2, 1999, the newly inaugurated president of Venezuela, Hugo Chávez Frías, gave his first political speech in front of thousands of people in Caracas. On El Paseo Los Próceres, an impressive complex of historical monuments that honor the national heroes of Venezuelan independence, Chávez started his speech by saying:

¡Viva Venezuela! ¡Viva! ¡Viva el pueblo venezolano! ¡Viva! ¡Vivan los pueblos de la América Latina y el Caribe! ¡Que vivan los pueblos del mundo! ¡Viva! Todo lo que va a ocurrir debajo del sol, tiene su hora. Eso lo dice el libro sagrado del Eclesiastés: “Todo lo que va a ocurrir debajo del sol tiene su hora” Hoy, 2 de febrero de 1999 ¡llegó la hora del pueblo de Venezuela! Hoy 2 de febrero de 1999, llegó la hora de la resurrección de la Patria de Simón Bolívar.

In his emotional address, and after having uttered just a few words, Chávez used his first metaphor in a political rally as the new president of Venezuela: “la resurrección de la Patria de Simón Bolívar.” The use of the word *resurrección* is a personification metaphor that, in this case, refers to Bolívar’s fatherland, Venezuela. This metaphor, which could be interpreted to imply the underlying proposition VENEZUELA IS A RESURRECTING PERSON, was the first of a set of recurring metaphors that Chávez has been using since he took office in 1999. This underlying proposition is what is commonly referred to as a conceptual metaphor in cognitive linguistics. The analysis of Chávez’s conceptual metaphors used to describe the Venezuelan nation, Chávez’s Bolivarian Revolution, and his opposition, forms the backbone of this study.

The purpose of the present chapter is to introduce the research and outline the structure of the dissertation. First, the chapter provides an overview of the study by

describing it in general terms. Then it highlights the relevance of the study and states its expected contributions to the field of political discourse analysis. In addition, it presents the main arguments and research questions that drive the analysis, and then places the study within its research context by reviewing other works on Latin American political discourse in general, and Chávez's political discourse in particular. Finally, the chapter ends with a conclusion, and provides a short outline of the structure of the remainder of the dissertation.

1.1. Overview

This study examines the metaphors used by Venezuelan President Hugo Chávez in his efforts to construct and legitimize the political project known as the Bolivarian Revolution. It focuses on metaphors drawn from three of the most frequent target domains present in his discourse: the nation, his revolution, and the opposition. The study argues that behind an official discourse of inclusion, Chávez constructs a polarizing discourse of exclusion in which his political opponents are represented as enemies of the nation.

The study argues that Chávez constructs this polarizing discourse of exclusion by combining metaphors that conceptualize: (a) the nation as a person who has been resurrected by his government, as a person ready to fight for his revolution, or as Chávez's himself; (b) the revolution as war; and (c) members of the opposition as war combatants or criminals. At the same time, the study shows that by making explicit references in his discourse about the revolution as the continuation of Bolívar's wars of independence, Chávez contributes to represent opponents as enemies of the nation, given that in the Venezuelan collective imaginary Simón Bolívar is the symbol of the nation's emancipation.

This research, which covers a period of nine years (from Chávez's first year in office in 1999 through 2007), is part of the discipline of Political Discourse Analysis (PDA). It is anchored both in the theoretical framework provided by the cognitive linguistic metaphor theory developed by George Lakoff and Mark Johnson, described in their book Metaphors We Live By, and in Critical Metaphor Analysis (CMA) as defined by Jonathan Charteris-Black in his book Corpus Approaches to Critical Metaphor Analysis.

1.2. Relevance of the Study

This study builds upon the findings of previous studies on political discourse analysis in Venezuela and attempts to show that Chávez's discourse not only polarizes the country and represents opponents as detractors of national symbols such as Bolívar or his wars of independence (which have been clearly established in previous studies),¹ but also represents political opponents as enemies of the nation.

Also, while there is a significant body of works on Venezuelan political discourse, this dissertation provides the first comprehensive analysis of metaphors used by Hugo Chávez. It covers a period of nine years, from 1999 until 2007, which is the longest period covered to date by any study on Chávez's use of language. This larger scope seems necessary in order to trace the evolution of Chávez's representation of political opponents, and to understand how the representation of opponents as enemies of the nation emerged in his discourse.

In addition, this dissertation analyzes Chávez's discourse from two methodological perspectives that have been largely overlooked in Venezuelan PDA:

¹ See section 1.4.4. of this dissertation for a complete literature review of studies on Chávez's political discourse.

Critical Metaphor Analysis and Cognitive linguistics. Identifying the cognitive and affective bases of metaphors in political discourses is important because they exploit “the subliminal resources of language by arousing hidden associations that govern our systems of evaluations” (Charteris-Black, *Politicians and Rhetoric* 2).

Finally, given Venezuela’s current political conjuncture, a comprehensive study of the way in which Chávez uses language seems increasingly important in order to understand how he creates and legitimizes his Bolivarian Revolution. Thus, although in December 2007 he lost the referendum on his proposal for modifying 69 articles of the Constitution, his ability to amass power and obtain public support is undeniable and deserves to be studied: he lost the referendum by only 1% after almost nine years in power (Romero A1). Also, in his first speech after being reelected on December 3, 2006, Chávez said:

La nueva época que hoy comienza tendrá como idea, fuerza central, fundamental, como línea estratégica fundamental, la profundización, la ampliación y la expansión de la Revolución Bolivariana, de la democracia revolucionaria en la vida venezolana hacia el socialismo.

At this point, it is not clear what the *profundización*, *ampliación*, and *expansión* of the Bolivarian Revolution entail. However, according to the International Crisis Group in a February 22, 2007 report entitled “Venezuela: Hugo Chávez’s Revolution,” Chávez’s second term is likely to show “further expansion of executive power, nationalization of key economic sectors and politicizations of state institutions, as well as an increased control over the flow of information. Venezuela seems set to move further down the road to autocracy” (1). Given this conjuncture, a comprehensive analysis of his discursive strategies seems now more important than ever.

1.3. Main Argument and Research Questions

1.3.1. Main Argument

The main argument of this study is that behind an official discourse of inclusion,² Chávez constructs a polarizing discourse of exclusion in which members of the opposition are represented not only as opponents of the revolution but also as enemies of the nation. Chávez represents members of the opposition as enemies of the nation in two ways:

- I. By combining metaphors that conceptualize: (a) the nation as a person resurrected by Chávez's government, as a person ready to fight for the revolution, or as Chávez himself, (b) the revolution as war, and (c) members of the opposition as war combatants or criminals.
- II. By making explicit references in his discourse about his revolution as the continuation of Bolívar's wars of independence. The study argues that these references contribute to represent opponents as enemies of the nation because in the Venezuelan collective imaginary Simón Bolívar is the symbol of the nation's emancipation (the founder of the republic).

Chapter 3 provides the background that supports this statement.

1.3.2. Research Questions

The following seven research questions underlie the present study. Chapter 3 answers the first question, while chapters 4, 5 and 6 answer the rest of the questions.

- How has Bolívar become the symbol of the country's emancipation in the collective imaginary of Venezuelans?

² See section 1.3.3. entitled Official Discourse of Inclusion

- What are the metaphors used by Chávez when referring to the nation, his revolution, and the opposition?
- How do those metaphors conceptualize the nation, his revolution, and the opposition?
- How have those conceptualizations evolved from 1999 through 2007?
- Does the combination of those metaphors contribute to the representation of opponents as enemies of the nation? If so, how?
- Are there any explicit references in Chávez's speeches that represent his opponents as enemies of the nation? If so, what are those references?
- Are there any explicit references in Chávez's speeches that represent his Bolivarian Revolution as the continuation of Simón Bolívar's independence wars? If so, what are those references?

1.3.3. Official Discourse of Inclusion

Chávez's government uses an official discourse of inclusion reflected in its ubiquitous slogan, "Venezuela ahora es de todos." This rhetoric can be found in both government speeches and official documents. For instance, in a speech given on the day of the 2002 coup d'état (the 2002 speech of the corpus), Chávez said:

Mañana, pues, estaremos reunidos cerca del mediodía para dar el primer paso en esa dirección de la instalación de una gran mesa de consenso, diálogo para avanzar, para construir con la consigna de que Venezuela es de todos y de que Venezuela es para todos.

Also, in the same speech he said, "Venezuela es de todos, no es de un pequeño grupo, sino es de todos ustedes," "Venezuela es de todos y cada día será más de todos y para todos nosotros," and "[una patria] para todos, bonita para todos."

The rhetoric of inclusion has existed in Chávez's discourse since the beginning of his presidency. For example, in a speech given one hundred days after he took office (the 1999 speech of the corpus), Chávez discussed the challenges that his government had assumed: “[H]emos llegado aquí, hemos asumido esta tarea inmensa, difícil tarea, dura tarea, pero hermosa tarea, de rescatar la Patria, nuestra Patria, la Patria de todos.”

In political terms, Chávez has framed inclusion as “democracia participativa y protagónica.” Thus, the president and other government officials repeat the phrase over and over in their public appearances and speeches. They usually oppose “democracia participativa y protagónica,” which was introduced in the 1999 Constitution to define the Venezuelan political system, to “democracia representativa,” which is the concept used in the previous Constitution (promulgated in 1962). This framing suggests that the new democracy not only allows more participation than previous ones, but also casts all citizens as protagonists of the democratic process (Hurtado Leña, “Democracia bolivariana, participativa y protagónica”). For instance, in the 1999 speech mentioned above, Chávez discussed the constitutional referendum in these terms: “Es la reivindicación de la democracia, pero la verdadera democracia, la democracia participativa, la democracia que consulta.” Following this referendum, the Constitutional Assembly incorporated this official discourse into the 1999 Constitution, which declares its aim: “con el fin supremo de refundar la República para establecer una sociedad democrática, participativa y protagónica.”

The official discourse of inclusion has been a constant in Chávez's presidency since 1999 until the present. For instance, in the article “Venezuela dice ‘no’ a la Constitución de Chávez,” published by *El País* in December 2007, Francisco Peregil noted the rhetoric of inclusion in a statement given by Chávez after having lost the

referendum to pass his constitutional proposal: "Seguiremos trabajando, haremos el esfuerzo más grande para lograr la máxima inclusión social, la igualdad como principio del sistema."

1.4. Literature Review

In 1997, in "Discourse Studies in Latin America," Teun van Dijk provided an overview of discourse analysis in the region. He argued that Latin America's earlier theoretical orientation toward French models such as semiotics was yielding to the influence of British and especially US approaches. Van Dijk also argued that discourse analysis had become widely integrated into both undergraduate and graduate curricula in Latin America, perhaps to a much greater degree than in the US or Europe. In addition, he noted that the first region-wide organization on the subject, ALED (*Asociación Latino-Americana de Estudios del Discurso*), had been established, and it held its first congress in 1995 in Caracas under the auspices of the Venezuelan linguist Adriana Bolívar.

According to van Dijk, Political discourse analysis has had a long tradition in Latin America, and dates back at least to the 1970s. In "Discourse Studies in Latin America," he argued that political repression during the 1970s and 1980s had dampened interest in PDA in some Latin American countries because of the risks involved.

In a 2005 article, "Los estudios del discurso en América Latina hoy," Adriana Bolívar provided an update to van Dijk's 1997 overview. Responding to Van Dijk's point about political repression in the 1970s and 1980s, she argued that because nearly all Latin American countries remain vulnerable democracies, the same risks remain. According to Bolívar, PDA in Latin America is political as well as analytical:

Nuestras palabras no pueden quedar solo en los libros y en las revistas. Deben llegar a las fuentes del poder y a los responsables de la toma de decisiones.... Esa es una tarea ineludible.” (353)

Since the publication of van Dijk's article, Bolívar noted that the momentum in discourse analysis had grown in Latin America. She analyzed quantitative data on subjects discussed on panels at ALED conferences, and found strong interest in ideology, the media and institutions. In addition to discussing the region-wide developments, Bolívar noted that new programs had been established in the subject in universities in several countries: Argentina, Chile, Mexico and Venezuela.

1.4.1. Argentina

In Argentina, political discourse analysis has been linked to political aims. Alejandro Raiter, a professor of psycholinguistics and sociolinguistics at the Universidad de Buenos Aires, has used discourse analysis to investigate ideology in terms of production, circulation and reception in works such as his 2003 book, Lenguaje y sentido común: las bases para la formación del discurso dominante. In his 2001 article for *Rethinking Marxism*, “Discourse Formations and Ideological Reproduction: The Concept of Dominant Discourse,” Raiter began his analysis by asking why the left in Argentina was ineffective in creating a persuasive discourse. He examined the political discourse of the left and argued that it had failed because it framed its critique by using neoliberalism’s own terminology (words such as "efficiency" and “deficit”) (92). In terms of praxis, he discussed the need for a “discourse initiative” that could effectively challenge the dominant discourse.

Since the mid-1990s, María Laura Pardo has studied persuasion in terms of the discourse of globalization in Argentina, working within an interdisciplinary team at the

Consejo Nacional de Investigaciones Científicas y Técnicas (CONICET). In her 2001 article, "Linguistic Persuasion as an Essential Political Factor in Current Democracies: Critical Analysis of the Globalization Discourse in Argentina at the Turn and at the End of the Century," Pardo examined the discourse of persuasion in Argentina during the period of globalization ending in 1914, as well as during the current period of globalization. She showed how texts supporting globalization in both eras used fears based on national identity, and concluded that this discourse was not only persuasive, but coercive in offering no alternative. In her 2005 article, "La representación discursiva de la identidad nacional durante la década del 20: inmigración y nacionalismo en la Argentina," Pardo examined the linguistic strategies to represent national identity in Argentina in press articles from publications across the political spectrum.

1.4.2. Chile

At the Universidad de Chile, the critical discourse analysis of Leda Berardi has examined governmental discourse in terms of political legitimacy, exclusion and poverty. In her 1996 article, "Legitimidad y discurso presidencial. Un análisis de los discursos de los presidentes Eduardo Frei Montalva y Eduardo Frei Ruiz-Tagle," Berardi examined newspaper interviews of two Chilean presidents, before and after the Pinochet era. Berardi examined their discursive strategies by classifying the component topics in terms of didactic/descriptive (*saber*), programmatic (*haber*) and proscriptive (*deber*). She argued that the dominance of *haber* by the then-president, Frei Ruiz-Tagle (1994-2000), in contrast to *saber* by his father Frei Montalva (1964-70), reflected changing values underpinning the discursive strategies each used to legitimize his presidency.

In her 2005 article, "La distancia entre el decir y el (poder) hacer. Un análisis crítico de los mecanismos discursivos de persuasión en el Presidente chileno Ricardo

Lagos,” Berardi examined the speeches of Chile’s then-president, Ricardo Lagos. She argued that the president’s use of inclusive terms such as “we,” served as discursive strategies to mask widespread exclusion in Chile. In her 2001 article, "Globalization and Poverty in Chile," Berardi examined how government discursive strategies used inclusive and exclusive terms as well as metaphors, contrast, repetition and transference. She argued that the government employed these strategies to persuade the Inter-American Development Bank and the Chilean public that social equity was possible if it received funding from the Bank.

1.4.3. Mexico

In Mexico, the political discourse analysis of Teresa Carbó has focused on parliamentary discourse in the country, notably in her 2002 book, Discurso parlamentario mexicano entre 1920 y 1950: un estudio de caso en metodología de análisis de discurso. In her 1992 article, “Towards an Interpretation of Interruptions in Mexican Parliamentary Discourse (1920-60),” Carbó analyzed interruptions in Mexico’s Chamber of Deputies. Using a conversational analysis approach, she examined archival records of the period between 1920 and 1960, and found that interruptions, although forbidden under rules of procedures, were frequent. Carbó, who is based at the Centro de Investigaciones y Estudios Superiores en Antropología Social (CIESAS), argued that interruptions served to legitimize the ideology of pluralism in a country where a single party monopolized power.

The work of Irene Fonte, a professor at the Universidad Autónoma Metropolitana, has focused on discourse in the Mexican and Cuban press on political developments. Her 2002 book, La nación cubana y Estados Unidos: Un estudio del discurso periodístico (1906-1921), examined the Cuban press over a series of political crises. She argues that

Cuban political discourse during these years created representations of national identity, but at the same time it was cautious about questioning the situation of Cuba under US hegemony. In her 2008 article, "Un estudio pragmático del conflicto político mexicano-cubano (2004) en la prensa," Fonte focused on enunciations reported in the press by Mexican and Cuban officials during a diplomatic crisis between the countries in 2004. She argued that the discursive strategy of each side was to discredit the other in the media.

1.4.4. Venezuela

The analysis of contemporary political discourse in Venezuela has generated a great deal of interest among researchers in recent years. Beginning in the 1980s, three key factors have contributed to a restructuring of political discourse in the country: severe economic crises, rising levels of voter abstention, and an eventual breakdown of the traditional two-party system. This restructuring seems to be especially present in the discourse of Hugo Chávez, who after his failed coup d'état in 1992, became a key figure in Venezuelan politics (Romero, "El discurso político" 229).

Chávez's arrival to power in 1999 marked the beginning of the construction of the political project known as the Venezuelan Bolivarian Revolution. His political discourse has played a leading role in this process (Romero, "El Discurso Político" 229).

Since 1999, many studies have been published focusing on the president's discursive strategies from a wide range of perspectives. Researchers from Venezuelan universities have led the way in the analysis of Chávez's discourse from a linguistic point of view. Most of their studies seem to be anchored on the theoretical framework provided by critical discourse analysis as defined by Norman Fairclough and Teun van Dijk. The most prominent Venezuelan researchers, whose work is discussed below, are Adriana

Bolívar, Juan Eduardo Romero, Frances Erlich, Irma Chumaceiro, and Lourdes Molero. Although each of them has specialized in different aspects of Chávez's political discourse, they have also common research interests and have collaborated in several research projects together. Section 1.2. (Relevance of the Study) describes how this dissertation adds to the body of work carried out by these researchers.

The Work of Adriana Bolívar

Adriana Bolívar has conducted several research studies on Chávez's discourse at Universidad Central de Venezuela. Her most recent work has mainly focused on pragmatic analyses of the president's discourse, although she has also researched syntactic and sociolinguistic aspects of political discourse in general.

In 2001, Bolívar conducted a comparative study about pronouns entitled "El acercamiento y el distanciamiento pronominal en el discurso político venezolano," in which she finds that Chávez favors the use of the personal pronoun "we" (as opposed to "you") much more than Venezuela's two previous presidents: Rafael Caldera and Carlos Andrés Pérez. She concludes that Chávez uses the pronominal system more than Caldera and Pérez as a strategy to get closer to his interlocutors.

In 2003, Bolívar coordinated a group of researchers working on different aspects of Venezuelan political discourse. Their works were published as a compilation under the title "Discurso y democracia en Venezuela," in the Revista Iberoamericana de Discurso y Sociedad. Papers ranged from psychological accounts of the effects of Chávez's speeches on the people of Venezuela to linguistic analyses of the different discursive strategies employed by the president.

In a paper entitled "Divergencia, confrontación y atenuación en el diálogo político," written by Bolívar, Chumaceiro and Erlich, and published in the compilation

mentioned above, the authors examined 30 texts from different political actors. They argue that discursive practices in Venezuelan politics show that while there is a strong presence of conflict, this is simultaneously moderated by certain discursive elements. They noticed instances of confrontation at a macro-discursive level, but also instances of moderations manifested by concessive and conditional clauses as well as impersonal verbs and locutions.

In 2005, Adriana Bolívar published an article entitled “Nuevos géneros discursivos en la política: el caso de *Aló Presidente*.” She focused her discussion on the weekly television show hosted by Chávez, *Aló Presidente*. In her analysis, she distinguished several types of discourse in the show and argued that they mainly produce two effects. On the one hand, they promote cohesion of the followers of the president; on the other, they reinforce the division and polarization within the country. She also noticed the absence of political opponents in the show and questioned whether the show will ever become a place for real democratic debate.

The Work of Juan Eduardo Romero

Juan Eduardo Romero is a historian from Universidad del Zulia, whose work mainly focuses on the relation between political discourse and history. He is the author of two important papers on Chávez’s discourse: “El discurso político de Hugo Chávez (1996-1999),” and “Discurso político, comunicación política e historia en Hugo Chávez.”

In “El discurso político de Hugo Chávez,” Romero argues that from 1996 until 1999, the discourse of power in Venezuela went through a transitional phase characterized by a rupture with the symbolic structures that had prevailed up to that moment. According to Romero, although Chávez’s discourse was not yet clearly defined, it was already showing attempts to occupy all the spaces of public action in the political

system (243).

In “Discurso político, comunicación política e historia en Hugo Chávez,” which covers the period between 1998 and 2002, Romero argues that when Chávez addresses historical events in his discourse, he is attempting two different strategies: (a) taking advantage of the widespread rejection of traditional forms of political expression in Venezuela by creating new emotional domains; and (b) claiming that certain issues of Venezuela’s independence history remain unresolved in order to use them as elements of cohesion among his supporters (by identifying his supporters as the victims of these unresolved issues).

Romero says that Chávez’s strategies when handling history have three main objectives: (a) to reconstruct the near and distant past; (b) to delegitimize his political opponents; and (c) to justify the development of his political project. Romero’s findings have served as a starting point to build one of the main arguments of this dissertation: that Chávez conceptualizes his revolution as the continuation of Bolívar’s independence wars.

Finally, Romero states that Chávez’s use of language is a discursive attempt to establish a political hegemony in the Gramscian sense of the term. That is to say, the president’s use of language is aimed at creating ideological consensus to further his political project.

The Work of Frances Erlich

Frances Erlich has worked closely with Adriana Bolívar at Universidad Central de Venezuela. As Bolívar, Erlich has studied extensively Chávez’s discourse strategies in the weekly television show *Aló Presidente*.

In a 2005 paper entitled “La relación interpersonal con la audiencia: El caso del discurso del presidente venezolano Hugo Chávez,” Erlich shows evidence of Chávez’s

linguistic strategies when addressing his audience in *Aló Presidente*. Using the theoretical framework provided by Critical Discourse Analysis, she assumes that Chávez's strategies contribute to reflect and reproduce the polarization that has characterized contemporary political discourse in Venezuela. According to Frances, the president introduces topics that enable him to establish clear differences between his interlocutors, maintaining a relationship of solidarity with some of them, but one of exclusion with others. Frances concludes that the pragmatic function of the identified linguistic markers in Chávez's discourse plays an important role in developing a polarized dialogue, which prevents to overcome the sociopolitical conflict that exists in Venezuela.

In another paper, published in 2005 and entitled "Características y efectos del discurso autocentrado en Aló Presidente," Erlich argues that Chávez, to a large extent, builds his interpersonal relation with the audience by disclosing aspects related to his private life. Erlich analyzes Chávez's discourses according to underlying semantic categories, the sociological concept of face-work based on Chávez's image, and politeness theory. The study demonstrates how discourse plays a significant role in Chávez's attempts to boost his public image, and in establishing differentiated relationships with the various social groups that he addresses in *Aló Presidente*.

The Work of Irma Chumaceiro

Irma Chumaceiro has published extensively on Venezuelan political discourse at Universidad Central de Venezuela. In her study "El Discurso de Hugo Chávez: Bolívar como estrategia para dividir a los venezolanos," published in 2003, she analyzes Chávez's political discourse and clearly identifies some of his main discursive strategies.

Chumaceiro points out that the excessive and reiterated use of the name "Bolívar" and the adjective "Bolivarian" in Chávez's discourse has two key functions: on the one

hand it serves to legitimize his policies, and on the other it helps to delegitimize his opponents. Chumaceiro mentions that the use of these terms functions as an element uniting Chávez's followers around a coherent political project: the Bolivarian Revolution.

Also, she says:

Al [Chávez] relacionar directamente su propio liderazgo con el del Libertador, y su proyecto político con la Revolución de Independencia, implícitamente, está convirtiendo a sus adversarios políticos en detractores de los más altos valores y símbolos nacionales. (26)

This dissertation expands on Chumaceiro's findings and shows that Chávez not only represents opponents as detractors of Venezuelan national symbols, but also represents them as enemies of the nation.

In terms of metaphor analysis, Chumaceiro is one of the few researchers who has highlighted the importance of metaphors in political discourse in general, and in Chávez's discourse in particular. In the study "El Discurso de Hugo Chávez: Bolívar como estrategia para dividir a los venezolanos," she argues that metaphors transmit, through simple images, complex notions that would be otherwise difficult to express. Metaphors, she says, contribute in many cases to construct social representations.

Although she does not carried out a thorough metaphor analysis, Chumaceiro provides possible interpretations to some of the metaphors employed by the president.

She cites and analyzes an excerpt from a speech given by Chávez on July 29, 2002:

Alerta, alerta que camina la espada de Bolívar por América Latina. Viva Bolívar. El padre Libertador ha vuelto convertido en pueblo. Como dice Neruda "Bolívar despierta cada cien años cuando despiertan los pueblos."

Aquí está Bolívar transformado en pueblo, en divino pueblo, en divino sueño, en divina esperanza, en camino de redención social. (37)

Chumaceiro argues that the image of “la espada de Bolívar,” humanized, walking throughout America, can have several interpretations: as the disseminator of Bolívar’s ideals to provoke social change, or as the herald of a new war to free the subcontinent. Similarly, she cites and analyzes an excerpt from a speech given by Chávez on January 5, 2003:

No lo van a poder, resulta nada más y nada menos que estamos en la cuna del Libertador de América y estamos hechos por un barro de libertadores. No podrán con los libertadores de América, aquí estamos y garantizaremos la libertad de esta patria. (38)

Chumaceiro argues that in this text, “los libertadores de América” are Chávez and his followers. The *barro*, she says, alludes to the determination of the Bolivarians who will never be defeated by the others, the adversaries of the fatherland.

The Work of Lourdes Molero

Another researcher that has investigated the role of metaphors in Chávez’s discourse is Lourdes Molero. In an article published in 2001 entitled “Formas y estrategias de persuasión en el discurso político venezolano: la construcción del ‘yo’ y del ‘otro’ bajo un enfoque semántico pragmático,” Molero devotes a section of her article to metaphors and says that their use seems to be one of Chávez’s most important discursive strategies in his attempt to persuade the public.

In 2003, she published an article entitled “Revolución y oligarquía: la construcción lingüística y discursiva de los procesos e identidades en el discurso político venezolano,” in which she also devotes a section to metaphors. Molero identifies conflict

as one of the most frequent semantic domains that Chávez employs when using metaphors. She also mentions politics and history and gives some examples of the president's use of metaphors in his discourses. Molero's findings on semantic domains in Chávez's use of metaphors have served as point of reference for this study.

In 2007, in a different vein, Lourdes Molero published an article with Adriana Chirinos entitled "La imagen del yo y del otro: construcción de identidades en los discursos de toma de posesión de los presidentes de Venezuela y Brasil." In their analyses of Hugo Chávez's and Luiz Inácio Lula da Silva's discursive strategies, the authors suggest that: (a) both presidents present themselves as the main agents of the process of change and improvement in their countries; (b) both present the sociopolitical crises in their countries as a consequence of the errors made in the past, and introduce change as the only solution; (c) they portrait opponents in a negative way, and refer to "others" in a direct manner or by using depersonalization; d) polyphony, solidarity, victimization, and coercion are the most common persuasive tools use by Chávez and Lula.

1.4.5. Earlier Dissertations on Chávez's Discourse

The present dissertation adds to an existing group of dissertations that focus on Chávez's discourse as their main object of study. Among previous works, two recent ones are worth noticing given their proximity to this study in terms of their research goals: one completed in the United States, and the other in Venezuela. The former is a doctoral dissertation defended by Marianallet Méndez-Rivera in 2006 at the University of Minnesota, and the latter is a thesis of *Licenciatura* defended by María Alejandra Muñoz Navarro at the Universidad Católica Andrés Bello in 2007.

Marianallet Méndez-Rivera's thesis, entitled "Maintaining and Enhancing Political Power via the Mass Media: The Rhetoric of H. R. Chávez, President of Venezuela," argues that Chávez has succeeded in maintaining and enhancing his political power by developing a sense of identification with his audience based on five specific themes: (a) references to past governments; (b) references to the revolution; (c) invitations to join the revolution and efforts to unify the citizenry; (d) promoting the government's plans and achievements; and (e) references to and condemnation of economic neoliberalism.

According to Méndez-Rivera, these five elements enable Chávez to convey a convincing message, and to constitute his revolutionary *pueblo*. To create a narrative that invites identification in his audience, Chávez implements different strategies such as highlighting the contrast of his government with previous administrations, or using of the ideology and ideographic character of Bolívar. She claims that "since people recognized themselves in Chávez's oratory and wanted to participate in his revolution, they became the revolutionary *pueblo* that Chávez aimed to constitute" (144).

María Alejandra Muñoz Navarro's thesis is entitled "Caracterización del presidente Hugo Chávez Frías como 'persona retórica' a través del examen de uso que él hace de un cierto número de 'figuras de la retórica', o 'estructuras retóricas' insertas en actos de habla, que contribuyen con la creación de la misma." She focuses on Chávez's use of rhetorical figures such as hyperbole and pleonasm, as well as on the grammatical mechanism of high semantic content called iteration.

She asserts that the presidential discourse with hyperbolic and pleonastic traits seems to be addressed to Chávez's supporters, who usually agree with its content and

approve of it. The same discourse seems to be equally rejected by his opponents, who often quote parts of it to sustain arguments against Chávez and his administration.

In addition, she says that the president's use of hyperbolic and pleonastic resources seem intentional. She suggests that Chávez uses iteration to provoke rejection among his opponents, which reinforces the political polarization in the country. She concludes that Chávez's use of hyperbole, pleonasm and iterations seem to reveal a clear political intention.

1.5. Structure of the Remainder of Dissertation

This section presents an outline of the remainder of the study, and includes a brief description of the content of each chapter. The structure of the dissertation is as follows:

Chapter 2 presents the theoretical framework and methodology on which the dissertation is based. It is divided into three parts. The first part, entitled Background, starts by tracing the history of the study of political discourse from the emergence of rhetoric in ancient Greece to the development of Political Discourse Analysis (PDA) today. It then defines what PDA is and reviews current approaches to analyzing political discourse, including metaphor approaches.

The second part, entitled Theoretical Framework, discusses in detail the two theoretical approaches underlying this dissertation: the cognitive linguistic theory of metaphor of Lakoff and Johnson, and Charteris-Black's Critical Metaphor Analysis (CMA). This part shows how these approaches work well together in providing a suitable theoretical framework for the study of Chávez's political discourse.

The last part, entitled Methodology, describes the method used to analyze Chávez's speeches. In addition, it defines the corpus and provides a brief description of the historical context surrounding each speech.

Chapter 3, entitled *The Cult of Bolívar and Chávez's Revolution*, is divided into three parts: the first part traces Bolívar's life and legacy, the second part describes the imaginaries³ associated with the Bolivarian ideology throughout history, and the last part traces the history of the Bolivarian Revolution and attempts to identify its ideological content.

The purpose of the first two parts is to provide the necessary historical background to understand how Bolívar has become the symbol of the nation's emancipation (the founder of the republic). The purpose of the third part is to identify the different ideological sources and mechanisms that shape Chávez's Bolivarian Revolution. This is essential as it provides a context for the analysis of his discourse.

Chapter 4, entitled *Refounding the Nation - Analysis of Data (1999-2001)*, presents and analyzes the results of the study from his first year in office in 1999 through 2001. It shows how Chávez distanced himself and his Bolivarian Revolution from previous governments by representing the nation as a "resurrecting person," by conceptualizing his Bolivarian Revolution in terms of a "war against previous regimes," and by representing former governments with destruction metaphors and current opponents with conflict metaphors.

Chapter 5, entitled *Polarizing a Divided Nation - Analysis of Data (2002-2004)*, shows how Chávez's primary rhetorical objective during that period was to polarize an already divided country. He did this by gradually creating a discourse in which his Bolivarian Revolution was mainly conceptualized as a conflict between supporters and opponents. In this discourse, the opposition was first defined only in terms of Venezuelan

³ In this chapter "imaginary" is understood as the symbolic construct through which a national community (in this case the people of Venezuela) defines and represents itself. This definition is taken from the work of Venezuelan political sociologist Luis Ricardo Davila (Davila, *The Social and Political 2*).

opponents, but later in terms of allies of US imperialism as well. By creating a polarized political environment, and by portraying his opponents as allies of US imperialism, Chávez contributed to constructing a discourse in which opposing his Bolivarian Revolution is conceptualized as opposing the nation.

Chapter 6, entitled Consolidating the Bolivarian Revolution - Analysis of Data (2005-2007), shows that Chávez's primary rhetorical objective during that period was to support the institutionalization of his revolution by consolidating the political discourse that he has been constructing since 1999. For this, Chávez shifted the conceptualization of the Venezuelan nation from "an active agent" to "a mature person," while continuing to represent his revolution as war and to portray his political opponents as criminals and enemies of the nation. In addition, Chávez introduced in his political discourse the concept of capitalism and conceptualized it as a new threat to his Bolivarian Revolution. The institutionalization that the president tried to support with his discourse consisted of the introduction and acceptance of "socialism of the twenty-first century" as a viable political system, the creation of the PSUV (*Partido Socialista Unido de Venezuela*), and the approval of constitutional reforms.

Chapter 7, entitled Conclusion, is the last chapter of this dissertation. It answers the research question of the study by summarizing the most relevant findings, and by drawing conclusions based on comparisons among the different conceptual metaphors identified, explained and interpreted throughout the study. Moreover, this final chapter examines the limitations of the study and provides recommendations for future studies on political discourse analysis in general, and on the analysis of Chávez's discourse in particular.

1.6. Conclusion

For the past nine years, Venezuela has been going through an unprecedented political transformation in her contemporary history. This political change, initiated by Hugo Chávez and known as the Bolivarian Revolution, has provoked an interesting and favorable context for the analysis of political discourse.

Researchers based in Venezuela, led by Adriana Bolívar, Juan Eduardo Romero, Frances Erlich, Irma Chumaceiro and Lourdes Molero, have analyzed several aspects of the political discourse of Hugo Chávez and have provided invaluable information that has contributed to the understanding of Chávez's discursive strategies to construct and legitimize his political project. Their works have defined the research lines of political discourse analysis in Venezuela and have shed light on the discursive strategies that Chávez uses to legitimize his revolution.

In "Discurso político, comunicación política e historia en Hugo Chávez," Romero noted Chávez's use of history to reconstruct the past, delegitimize opponents and legitimize his political project. His findings served as a starting point to build one of the main arguments of this dissertation: that Chávez conceptualizes his revolution as the continuation of Bolívar's independence wars.

Similarly, in her study "El Discurso de Hugo Chávez: Bolívar como estrategia para dividir a los venezolanos," published in 2003, Chumaceiro concluded that the excessive and reiterated use of the name "Bolívar" and the adjective "Bolivarian" in Chávez's discourse contributes to the polarization of the country given that it has two key functions: on the one hand it serves to legitimize his policies, and on the other it helps to delegitimize his opponents (representing them as detractors of Venezuelan national symbols). This dissertation also expands on Chumaceiro's findings and shows that

Chávez not only represents opponents as detractors of Venezuelan national symbols, but also represents them as enemies of the nation.

Although there have not been studies that focus specifically on the role of metaphors in Chávez's political discourse, Molero and Chumaceiro have studied metaphors as part of their works on other aspects of discourse. In a study published in 2001 entitled "Formas y estrategias de persuasión en el discurso político venezolano. La construcción del 'yo' y del 'otro' bajo un enfoque semántico pragmático," Molero noticed that Chávez's use of metaphors seems to be one of his most important discursive strategies in his attempt to persuade. In her 2003 article mentioned above, Chumaceiro looked at how metaphors help to construct social representations in Chávez's discourse. In the same year, in her article "Revolución y oligarquía: la construcción lingüística y discursiva de los procesos e identidades en el discurso político venezolano," Molero identified conflict as one of the main semantic domains that Chávez employs when using metaphors. Molero's findings on semantic domains in Chávez's use of metaphors have served as point of reference for this study.

In sum, this dissertation, which is part of a broader tradition of political discourse analysis across Latin America, builds on the conclusions of these researchers and expands upon their findings. By using the tools provided by the cognitive linguistic metaphor theory developed by Lakoff and Johnson, and Charteris-Black's Critical Metaphor Analysis (CMA), the study argues that behind an official discourse of inclusion, Chávez constructs a polarizing discourse of exclusion in which his political opponents are conceptualized as enemies of the nation. The study provides the first comprehensive analysis of metaphors used by Hugo Chávez. It covers a period of nine

years, from 1999 through 2007, which is the longest period covered to date by any study on Chávez's use of language.

Chapter 2: Theoretical Framework and Methodology

The goal of this chapter is to present the theoretical framework and methodology on which the dissertation is based. The chapter is divided into three parts. The first part, entitled Background, starts by tracing the history of the study of political discourse from the emergence of rhetoric in ancient Greece to the development of Political Discourse Analysis (PDA) today. It then defines what PDA is and reviews current approaches to analyzing political discourse, including metaphor approaches.

The second part, entitled Theoretical Framework, discusses in detail the two theoretical approaches underlying this dissertation: the cognitive linguistic metaphor theory developed by Lakoff and Johnson, and Charteris-Black's Critical Metaphor Analysis (CMA). This part shows how these approaches work well together in providing a suitable theoretical framework for the study of Chávez's political discourse.

The last part, entitled Methodology, describes the method used to analyze Chávez's speeches. In addition, it defines the corpus and provides a brief description of the historical context surrounding each speech.

2.1. Background

2.1.1. The History of the Study of Political Discourse

The study of political discourse is hardly new. The Greco-Roman tradition of rhetoric, understood as the art of verbal persuasion, was a means of codifying the way public orators used language. In both the Greek *polis* and the Roman Empire, the rhetorical tradition played a central part in the training of political orators. This provided a framework for the observation of political verbal behavior that continued for many centuries (Chilton & Schäffner 206-07).

The language of politics has been an object of study since classical times. Ancient Greeks were captivated by the different possibilities offered by political language, and they devoted considerable time and effort to its study. For them, language was an instrument to reveal the truth, express art, or achieve persuasion. The most tangible outcomes of the study of the language of politics in ancient Greece were the many treatises on oratory that were written (Lasswell 3).

The Greek philosopher Empedocles is considered the founder of rhetoric. In his book The Lives and Opinions of Eminent Philosophers, Diogenes Laërtius, biographer of ancient Greek philosophers, says that Empedocles' mastery of oral expression and skill in using metaphors made Aristotle to consider him "the inventor" of rhetoric (361).

Corax of Syracuse was the first philosopher to write a manual on rhetoric. The purpose of his manual was to provide rules and norms to those seeking to reclaim properties that had been confiscated by the tyrant Thrasybulus. Both Empedocles and Corax are considered to be part of the group of itinerary intellectuals known as Sophists, who appeared in ancient Greece in the second part of the fifth century BC (Hernández Guerrero et al 17).

The Sophists were essentially instructors of rhetoric and writers of speeches. Their emergence was mainly due to the growth of Athenian democracy, which was grounded in the ability to analyze and destroy the arguments of political opponents. In addition to teaching rhetoric, the Sophists questioned conventional beliefs about the universe and the human community. Their controversial views sparked powerful tensions and earned them many enemies (Pomeroy et al 192-93).

Although individual Sophists had their own doctrines and theories, it is possible to group their main ideas in one single theory based on their common traits, often referred

to as Sophist theory. According to this theory, a man can function well in the city-state only if he is a successful citizen. Being a successful citizen means participating in the assembly and the courts of law. To succeed there, it is essential to conform to the prevailing conventions as to what is fair, right and appropriate. Given that each state has its own conventions, what one must do is to adapt oneself to them in order to reach one's listeners successfully. The Sophists considered the teaching of these skills as both their business and their virtue. Their peculiarity was based on their attempt to teach simultaneously two tasks: how to persuade and how to live well in the city-state (MacIntyre 14-18).

Socrates was one of the most noted opponents of the Sophists. As a teacher of dialectics, he was interested in the quest for the truth rather than the art of persuasion (Joseph 110). According to some of the Socratic dialogues recorded by Plato, Socrates thought Sophists were a threat, not because they promoted atheism or immortality, but because they set themselves up as experts on the question "How is one to live?" without having the necessary knowledge. Socrates was concerned that if people's lives were ruled by rhetoric instead of being guided by philosophy, the pursuit of happiness would overtake the pursuit of the good in society, a situation that could lead to moral chaos (Taylor 25-44).

Plato also adopted an anti-rhetoric position, mainly addressed to the Sophists. In his Gorgias dialogue, he speaks of rhetoric as a trick to praise and seduce the auditorium, as a strategic skill to influence ignorant audiences, and as a persuasion strategy that intends to influence the feelings and behaviors of naïve men by decorative use of language. For Plato, rhetoric needed to be based on truth and hence on philosophy. The opposition between Sophist and philosophical rhetoric was a source of reflection for

Plato, which led him to conclude that the only valid form of rhetoric was the philosophical rhetoric (García García 4-5).

Although Plato never wrote a manual of rhetoric, his student Aristotle did. Aristotle's book On Rhetoric is considered a classic in the study of the subject, but also an ambiguous work. In his book A New History of Classical Rhetoric, George Kennedy argues that On Rhetoric presents several problems of interpretation mainly due to inconsistencies between what Aristotle says at the beginning of the book and his subsequent treatment of the subject in the rest of the book. Kennedy also points out some inconsistencies with the use of certain key terms. These problems seem to be due to the fact that the three parts of the piece were written at different points in time.

Aristotle opens On Rhetoric stating that there is nothing wrong with rhetoric, the persuasive use of language, as long as it is used rationally to demonstrate the truth. Problems begin, he said, when we try to persuade others by appealing to emotions rather than reason. He cautions that even those who use rhetoric correctly need to master it so that they can protect themselves from rhetoricians.

The development of rhetorical treatises continued into the Roman era. Cicero's On the Public Speaker is one of the most influential treatises of the period. In general, treatises consisted of highly structured lists aimed at both describing and prescribing effective techniques to influence audiences' thoughts and emotions. The applications of the theory and practice of rhetoric were considered part of the political life of the community (Chilton 584-85).

During the Roman period, rhetoric was a focal point of strict education intended to prepare citizens for civic life and public service; its connection with power was clear and direct. Training in rhetoric was seen as a key to personal and professional

advancement. Due to writers such as Longinus, rhetoric became a way to achieve style in written as well as oral communication. Longinus used Greek rhetoric to transform the Latin language, considered vulgar at the time, into a powerful and beautiful way of expression. In sum, rhetoric was for the Romans a powerful and practical linguistic skill, a skill that carried with it a strong sense of moral responsibility and ethics (Herrick 111-114).

During the Medieval period, the significance of oral communication was reflected in the various treatises devoted to the sermon. Given that sermons often addressed profane as well as religious issues, it can be assumed that the study of medieval ecclesiastical oratory gives us an insight into medieval political language (Lasswell 3-4).

Saint Augustine stands as a key figure between the Greco-Roman period and the Middle Ages. Augustine, who was trained in rhetoric, used it to defend Christianity and argued in favor of teaching rhetoric in Christian education so that the Church would have convincing advocates. Preaching, letter-writing and poetry were the skills that were cultivated. They were adapted from the Greco-Roman tradition for the social needs of medieval Europe. However, the need to teach Christian principles to a largely uneducated and illiterate population stressed the importance of teaching the art of preaching over letter-writing and poetry (Herrick 141-142).

From the fourteenth through the seventeenth century, Humanism (and especially Italian Humanism) was very much influenced by rhetoric. Prominent intellectuals such as Petrarch and Valla paid much attention to rhetoric, and argued that it, rather than philosophy, was the foundation of study. This enhanced the status of rhetoric significantly (Herrick 168). After the printing press was invented in the mid-fifteenth century, the literature of rhetoric progressively became concerned with the use of printed

media as well (Lasswell 4). An enormous number of books were devoted to the study of rhetoric. Many people studied the subject, and rhetoric was considered the language of educated people. It was probably during the Renaissance that the study of rhetoric achieved its greatest importance (Herrick 168).

During the eighteenth and nineteenth centuries, Enlightenment thinkers, influenced by the empiricism of science, started to question the power of language. Although the Enlightenment provoked a decline in the study of rhetoric, orators, politicians and preachers continued to apply their rhetorical knowledge in their professions (Chilton ix). Rhetoricians explored themes from the Greco-Roman period such as the importance of style and expression, ways of achieving personal refinement, and standards of proof for arguments (Herrick 192-93).

In the twentieth century, new forms of mass communication emerged. For the first time, a larger proportion of citizens were allowed to participate in electoral politics in a growing number of countries. Radio, followed by television, became important means of political communication, shifting the focus of political rhetoric from the printed word to mass telecommunication.

At the beginning of the Cold War, George Orwell brought attention to the political potential of language with his novel Nineteen Eighty-Four. In this satiric work, Orwell portrays a fictional dictatorship in which the traditional language (“Oldspeak”) is gradually replaced by, and transformed into, a new and simplified language (“Newspeak”) that serves the regime’s political purposes (Joseph 119-21). In an appendix to his novel, Orwell states the principles of “Newspeak” and gives the following example to illustrate the new language:

The word *free* still existed in Newspeak, but it could only be used in such statements as ‘This dog is free from lice’ or ‘This field is free from weeds’. It could not be used in the old sense of ‘politically free’ or ‘intellectually free’ since political and intellectual freedom no longer existed even as concepts, and were therefore of necessity nameless. (344)

Throughout most of the twentieth century, studies of rhetoric showed a tendency to interface with other disciplines such as politics, history, media and social theory. Although in the 1970s there were some studies on social semiotics and critical linguistics that could be considered to have a strong political discourse perspective, the analysis of political discourse in purely linguistic terms has emerged only since the early 1980s and 1990s (Wilson 399).

2.1.2. The Emergence of Political Discourse Analysis (PDA)

Zellig Harris introduced the term discourse analysis in 1952 for the purpose of analyzing connected forms of speech or writings. He aimed to extend descriptive linguistics beyond the boundaries of a single sentence at a time, and to correlate language and culture (Malmkjær 100). Since the late 1960s, several trends that recognize the role of language in structuring power relations in society have emerged. Foucault, Derrida and Weaver have examined the uses of language to discover, challenge, or preserve sources of power and knowledge (Herrick 269).

Political Discourse Analysis (PDA) deals with the analysis of political discourse. Although this may sound like a simple statement, it raises an important question: what do we mean by political discourse? (Schäffner 117-19). Indeed, the term political discourse suggests many possibilities. It could refer to a discourse that is political in itself; or it could refer to a simple discourse type that happens to be analyzed politically, but without

explicit reference to political content or political context. More broadly, we could consider that all discourses are political to a degree. This would mean that all discourse analysis is, at some level, political (Wilson 398-399).

Paul Chilton and Christina Schäffner define as potentially political “those actions (linguistic or other), which involve power, or its inverse, resistance” (212). However, as the authors point out, “power” and “resistance” are concepts that may have different interpretations and scope depending upon who is defining them.

In his book Discourse and Social Change, Fairclough explains that the main concern of his work is to analyze discourse as a political and ideological practice. His approach suggests that there is a one-to-one relationship between ideology and discourse, hence between politics and discourse. This is a controversial idea that has been contested a great deal (Pennycook 81). For example, in his book Discourse, Jan Blommaert criticizes this approach and wonders why Fairclough must assume that there are always hidden ideologies and power dimensions behind discourse. Blommaert questions Fairclough’s idea that language is never a neutral object (Blommaert 28-38).

John Wilson shares Graber’s delimitation of political discourse “as being concerned with formal/informal contexts and political actors” (398). For these authors, political actors include politicians, political institutions, governments, political media, and political supporters operating in a political environment with political goals. Wilson criticizes those analysts from the school of critical linguistics such as Fairclough, Wodak, and van Dijk, who take a clear political position while analyzing discourses. For him, they are acting more as political actors than as analysts.

Some analysts sustain that political realities are constructed through discourse. As mentioned in the previous section, Foucault, Derrida and Weaver have examined the uses

of language to discover, challenge or preserve sources of power and knowledge (Herrick 269).

Ernesto Laclau and Chantal Mouffe consider any type of discourse inherently political. According to them, discourses and the identities produced through them have an inherent political nature associated with the construction of antagonism and the exercise of power. That is to say, during the process of discourse formation, antagonisms are constructed and power is exercised, given that there are some (“insiders”) who will be part of the system, and others (“outsiders”) who will be completely excluded from it (Howarth et al 9).

However, Wilson argues that by considering all discourses as political, we may be overgeneralizing the concept of political discourse. To illustrate his point, Wilson talks about a study of a psychotherapeutic training institution where the author refers to her study of the discourse produced in staff meetings as “political” only because issues of control and power are being dealt with during the meetings.

Although it is difficult to maintain delimitations of the political character of discourse, they are useful starting points. Wilson maintains that, despite the fact that it is not easy to conceive a fully objective nonpolitical analysis of political discourse, it is possible for analysts to make clear their own motivations and perspectives before engaging in the analytical process. In order to achieve this, he provides analysts with three alternatives. The first one consists in setting some type of “democratic” ideal for discourse so that other types of political discourse could be assessed against the ideal. In the second one, the analyst could state explicitly her or his political goals in targeting political discourse for analysis. Finally, he suggests a more descriptive perspective where the main goal is to consider political language first as discourse, and then as political.

For the purposes of this dissertation, political discourse is delimited to political speeches produced by Chávez within the context of the Bolivarian Revolution in Venezuela. This includes speeches given in front of an audience, speeches for television, and talks part of *Aló Presidente*, his weekly television show.

2.1.3. Approaches for Analyzing Political Discourse

Several approaches have been developed and used in analyzing power relations in general, and political discourse in particular. In their article “Discourse and Politics,” Paul Chilton and Christina Schäffner discuss three main groups of approaches to the analysis of political discourse that emerged in the twentieth century: the French, German and Anglophone approaches.

The French approaches were developed by a combination of political scientists, philosophers, and linguists. There are two main trends. The first is called ‘political lexicometry.’ It was founded in 1967 at the *École Normale Supérieure* of Saint-Cloud. It is a computer-assisted statistical method to the political lexicon that establishes a corpus and then makes comparisons based on frequency of words. Given its quantitative nature, political lexicometry only provides raw data for further political interpretation and analysis. The second trend is influenced by Althusser’s analysis of society and ideology. This is a Marxist analysis that stresses the notion of the “state apparatus.” This approach fits other discourse approaches that think of state politics as a complex set of discourses that create political subjects (209).

The German approaches have mainly focused on fascism and the political division of Germany into two states. Early studies were mainly word-centered analyses. Text-oriented and action-oriented communicative analyses could also be found in the corpus of studies on the two German states. The subsequent reunification brought new

material for political discourse analysis, especially in pragmatics, sociolinguistics and cognitive linguistics (209-210).

The Anglophone approaches include studies mainly from Britain and the US, but also from Belgium and the Netherlands. George Orwell's satirical position in Nineteen Eighty-Four toward political discourse was recognized and developed by British linguists such as Fairclough, Fowler, Hodge and Kress. An important influence was Halliday's version of functional linguistics, which made it possible to link linguistics to social and political activities. In the United States, Chomsky has had a profound influence with his critics of American foreign policy. However, he has not used any theoretical framework from applied linguistics to make his analyses. US scholars who have applied linguistics to the analysis of political discourse have lacked the Marxist approach of their European counterparts (210-211).

Today there is a broad consensus that politics cannot exist without the strategic use of language (Chilton 13-15). In his book Language and Symbolic Power, Pierre Bourdieu convincingly argues for the importance of language in the exercise of power. Bourdieu argues that language is not only a means of communication, but also an instrument of symbolic power by which individuals pursue their interests.

The awareness of the close relationship between politics and language, coupled with the rapid expansion of print and electronic media in the last fifty years, have contributed to the development of critical evaluations of discourses (Chilton & Schäffner, 206). Since the 1970s, an analysis of discourse and text that recognizes the role of language in structuring power relations in society has emerged. One form of these analyses is called Critical Discourse Analysis (CDA) (Wodak 1-3).

In general terms, CDA can be classified into two main types. The first type of analysis deals with the ways in which unequal power is reproduced in conversation. It focuses on issues such as control over topics, interactions, and turn-taking. By doing this kind of analysis, it can be demonstrated, for example, that topics are introduced and changed by the dominant participant in a conversation. This shows how power determines who speaks first, for how long, and about which topic (Pennycook 85-89).

The second type deals with the content and not with the structure of the text. It concentrates on the ways in which ideologies are reproduced in discourses. The goal of the analysis is to uncover the underlying ideological systems and representations, and to show how they are related to the larger social order. This type of analysis understands an ideology as the hidden views of certain social groups, which they are able to promote as naturalized. These groups can do so because of the power they hold in society. By reproducing their ideology, they are able to reproduce the social relations of power. These two types of CDA have been developed since 1989 by Norman Fairclough in a series of articles and books that have influenced hundreds of researchers around the world (Pennycook 89-94).

CDA's proponents are often criticized for putting their own ideological agenda upfront as they claim to be committed to uncover operations by those in power. Their proponents are often accused of being activists instead of simple analysts. Critics wonder to which extent those two roles can be reconciled (Widdowson 71). In addition, CDA is criticized for always assuming that there are hidden ideologies and power dimensions behind discourse. Critics wonder why language can never be considered a neutral object in CDA (Blommaert 33-38).

Nevertheless, despite criticisms, CDA has established itself in the past thirty years as a strong discipline in the study of political discourse. In certain analyses, where there is little ambiguity about the political nature of a corpus such as in the analysis of political speeches, CDA tends to provide an appropriate and systematic theoretical framework for the analysis of political discourse.

Critical Metaphor Analysis (CMA), one of the key theories in this study, is one of the several approaches that derive from CDA. It was developed by Jonathan Charteris-Black as an approach to the analysis of metaphors in political discourse. Its purpose is to identify the intentions and ideologies underlying language use (Charteris-Black, *Politicians*, 26).

2.1.4. Analysis of Metaphors in PDA

Works focusing on metaphor analysis are usually anchored in one of the following theoretical frameworks: literalist theory, pragmatics theory, or cognitivist theory. In his book *Brown Tide Rising*, Otto Santa Ana provides a thorough discussion of these theoretical frameworks. He notes that literalist and pragmatics theories are both part of the positivist stream of research, while cognitivist theory belongs to the constructivist stream of research.

Positivism assumes that the social world consists of things that are independent of human thinking, and whose constitutions are unaffected by human interaction. Santa Ana argues that when positivists look at social objects of study, the “natural” categories of those social objects may be discovered, and statements can be made that reflect those discoveries. Emphasis is placed on the expression of facts rather than figurative (or non-factual) ways of expression (21).

According to literalist theory, metaphors can only be interpreted by means of linguistic structure and lexical meaning systems. Pragmatics theory, on its part, assumes that metaphors can only be understood as a communication phenomenon exclusively involving the information that can be deduced from linguistic strings, as well as information derived from certain defined principles about the way people interact. Therefore, both literalist and pragmatic theory assume that interpretation of metaphors mainly depends on the corresponding literal linguistic strings (22-24).

Constructivism, by contrast, assumes that cognition is a mental construction and that figurative (or non-factual) language gives structure to our view of the world. The neurological processing of language is not assumed to be fundamentally different from other cognitive processes. Therefore, “in the absence of evidence of distinct hardwiring of human brains corresponding to different thinking processes, constructivists assume that there is cognitive uniformity across linguistic and non-linguistic processes” (28).

Metaphor theory based on the cognitive science paradigm, whose main representatives nowadays are George Lakoff and Mark Johnson, asserts that metaphors are closely related the social values of those who use them in their speech. Metaphors provide the cognitive framework of speakers’ view of the world. Consequently, metaphors can be studied to uncover the values underlying speakers’ social order (21).

In general, research studies on metaphor analysis can be classified into three types: (1) those that focus on press articles written by journalists and other media professionals; (2) those that focus on political speeches, policy statements, press conferences and political debates; and (3) those that focus on creative works such as novels, short stories, poems and plays (Charteris-Black, *Politicians* 15).

Metaphor theory and Critical Metaphor Analysis, which serve as the theoretical foundation of this dissertation, both belong to the constructivist view of linguistics. Their principles are discussed in detail in the following section of this chapter.

2.2. Theoretical Framework

2.2.1. Metaphor Theory

This section is divided into four parts: origins, description, fallacies, and criticisms. The first part traces the origins of Metaphor theory to Michael Reddy's article "The Conduit Metaphor" published in 1979. The second part, which is the core of the section, describes in detail the theory and defines the concepts and terminology associated with it. The third part states and explains four fallacies concerning metaphorical thought that have persisted throughout history. The fourth part deals with the main criticisms that have been made to the theory, and discusses the main arguments that have been raised in its favor.

Origins

Metaphor theory was first introduced in 1980 in the book Metaphors We Live By, written by George Lakoff and Mark Johnson. It belongs to the field of cognitive linguistics, which aims at explaining conceptual systems and language within the general study of the brain and the mind. This field draws on cognitive psychology, cognitive neuroscience, and developmental psychology. It attempts to unify those disciplines to explain as many aspects of language as possible, including syntax, semantics, and discourse (Lakoff and Johnson 270).

Since 1980, after Lakoff and Johnson published their book, metaphor theory has been expanded in a series of articles published by them and some of their collaborators such as Mark Turner and Zoltán Kövecses. In addition, many other researchers from all

over the world have adopted their metaphor theory and have contributed to the research of metaphors along those lines. (Knowles et al. 30)

Metaphor theory is influenced by the work of Michael Reddy as defined in the article “The Conduit Metaphor” published in 1979. Reddy observed that when talking about language, English speakers use in at least 70% of the cases what he called the conduit metaphor. According to this, ideas are conceptualized as objects, words are conceptualized as the containers where we put ideas, and communication is conceptualized as the process of sending them (286-292).

In an essay entitled “The Contemporary Theory of Metaphor,” Lakoff acknowledged Reddy’s influence on his work and summarized his contribution as follows:

Reddy showed, for a single, very significant case, that the locus of metaphor is thought, not language, that metaphor is a major and indispensable part of our ordinary, conventional way of conceptualizing the world, and that our everyday behavior reflects our metaphorical understanding of experience. (204)

Description

In Metaphors We Live By, Lakoff and Johnson expanded Reddy’s work and argued that metaphors that people use everyday (such as “to win an argument”) are surface manifestations of underlying conceptual relationships. They constitute mechanisms of conceptualization for understanding and expressing complex concepts or situations. According to the theory, every metaphor is based on a single idea (called a conceptual metaphor) that links a bodily with a non-bodily experience. In the example of

“to win an argument,” Lakoff and Johnson indicate in Metaphors We Live By that the corresponding conceptual metaphor is ARGUMENT IS WAR.

The conceptual metaphor has two domains: the source domain (e.g. war) and the target domain (e.g. argument). The target domain represents the non-bodily concept that is being communicated, and it corresponds to the domain that we are trying to understand when using the metaphor. The source domain, on the other hand, corresponds to the bodily domain that is being used in the metaphor to understand the target domain. That is to say, the source domain is the domain from which the metaphorical expression is drawn.

For instance, in a speech given by Chávez in 2006, the conceptual metaphor VENEZUELA IS A MOTHER, is drawn from the underlined metaphor in the following excerpt:

Miren, uno siempre busca el auxilio de los sabios, de los sabios, porque yo solo sé que no sé nada como dijo un filósofo, uno siempre anda buscando el auxilio de Dios, el conocimiento de los sabios, y Bolívar, uno de los más grandes sabios que parió esta tierra, que ha parido esta tierra.

Here, Venezuela, the birthplace of Bolívar, is given an attribute that is related with a mother: to give birth (*parir*). Therefore, we can say that the source domain is the mother, which is associated with essential bodily experiences known from childhood. The target domain is Venezuela, which implies an experience that is familiar to Venezuelans but that is non-bodily. The connections or correspondences between the source and the target domain are called mappings. We can say that the conceptual metaphor VENEZUELA ES UNA MADRE is the result of a mapping between the two domains.

Conceptualizing a nation through family metaphors is fairly common. George Lakoff, in his book Moral Politics published sixteen years after Metaphors We Live By, describes in detail the worldview of conservatives and liberals in the United States in terms of two models that share the same conceptual metaphor: THE NATION IS A FAMILY.

Although the models are underlined by the same conceptual metaphor, Lakoff asserts that they are fundamentally different. The progressive worldview, he argues, represents metaphorically the Nurturant Parent model, while the conservative worldview represents the Strict Father model. Lakoff says that the two models imply distinct moral systems that are based on different assumptions about the world. In addition, they interpret shared values such as fairness and responsibility in very different ways, and have very different moral priorities.

Lakoff claims that in the United States, people's beliefs about what a family should be like have a strong influence on their conception of society. For example, those who see the world in terms of a Strict Father model are likely to support more punitive policies at home and abroad than those who see the world in terms of a strong Nurturant Parent model. The latter, Lakoff says, are likely to favor more cooperative approaches such as social policies in health care or education that ensure the well-being of people. Someone with a strong Strict Father model would probably object to social programs in favor of promoting self-reliance.

In Metaphors We Live By, Lakoff and Johnson distinguish between conventional metaphors (common metaphors that conceptualize our ordinary experiences) and imaginative/creative metaphors (those that provide a new conceptualization of our experiences). Metaphors such as THE NATION IS A MOTHER or THE NATION IS A

FAMILY are examples of conventional metaphors. Other more common examples include ARGUMENT IS WAR (manifested not only in “to win an argument,” but also in “to attack a point” or “indefensible claims”), HAPPY IS UP, THE FUTURE IS UP, SICK IS DOWN, LIFE IS A JOURNEY, etc.

Examples of imaginative/creative metaphors may be THE NATION IS A CIRCUS, SCHOOL IS A PRISON or THE COUNTRY IS A THEATER PLAY. According to metaphor theory, both types of metaphors (conventional and imaginative) shape the way we understand the world (Lakoff and Johnson 139). As our conceptual system is largely metaphorical, what we do everyday, what we experience, and the way we think are very much matters of metaphor (3).

Lakoff and Johnson note that cultures have multiple metaphors for a single source domain. For example, in English, ARGUMENT IS WAR, but also ARGUMENT IS A BUILDING (“the foundation of your argument is weak”), ARGUMENT IS A PATH (“the argument leads to a surprising conclusion”), ARGUMENT IS A VEHICLE (“let’s see where this argument takes us”), ARGUMENT IS A GAME (“good point, but how are you going to counter his next move?”).

However, Lakoff and Johnson argue that cultures also have some source domains attached to a single metaphorical expression. These expressions are idiosyncratic, and extending them would be considered fanciful or literary. For example, the expression “the foot of a mountain” (which conceptual metaphor is A MOUNTAIN IS A PERSON) is rarely extended to say “a shoulder of the mountain.” That would be something used by mountaineers and other experts in the field (Ritchie 35).

In cases of multiple metaphors, choosing a particular metaphor over another frames a topic in such a way that some aspects of the target domain are highlighted and

other are hidden (Ritchie 34). By highlighting certain aspects and hiding others, conceptual metaphors create new meanings that serve to sanction actions, justify inferences, and assist us in setting goals. New meanings are partly culturally determined and partly linked to past experience. In addition, they entail very specific aspects of the concept behind them (Lakoff and Johnson 142-43).

For example, the conceptual metaphor THE NATION IS A THEATER PLAY highlights aspects such as: citizens are actors, they work together, they must stick to their parts and follow the script, the president is the director, etc. However, it masks other aspects such as: citizens pay taxes, the nation may be at war, citizens' lives may be at risk, etc.

Conceptualizing in terms of metaphors matters as it may determine issues of war and peace, economic policy, legal decisions or simply everyday situations. To illustrate this point, Lakoff and Johnson say that a military attack can have very different military consequences depending on the way it is conceptualized: "Is a military attack a 'rape,' 'a threat to our security,' or 'the defense of a population against terrorism'?" Similarly, Lakoff and Johnson cite the example of a married couple and say that if there are drastic metaphorical differences in the way a wife and a husband conceptualize their relationship, serious problems may arise:

Take for example the case where one spouse views marriage as a partnership, and the other spouse views it as a haven. The responsibilities of a partnership may well be at odds with the relief from responsibilities characteristic of haven. (243-244)

Metaphor theory claims that thinking in terms of metaphors is normal and ubiquitous. It can be both a conscious and an unconscious process. Given that metaphors

are fundamentally conceptual in nature, metaphorical language is secondary. Conceptual metaphors are grounded in everyday, bodily experiences common to human beings.

In addition, the theory establishes that abstract thoughts are largely, though not entirely, metaphorical. Abstract concepts have a literal core that is extended by metaphors, often by many mutually inconsistent metaphors. Abstract concepts are not complete without metaphors. For example, love is not love without metaphors of magic, attraction, madness, union, nurturance, and so on (272-273).

The most important aspect of metaphor is inference. “Conceptual metaphor allows inferences in sensory-motor domains to be used to draw inferences about other domains” (244). For example, the conceptual metaphor VENEZUELA ES UNA MADRE, allows Venezuelans to make the following inferences: All Venezuelans are brothers and sisters, including Bolívar and Chávez. In Metaphor theory, these inferences are called entailments. They may include other metaphors. They arise from our beliefs and experiences about the concepts underlying metaphors (139).

For example, in the conceptual metaphor VENEZUELA ES UNA MADRE, the following entailments may arise depending on the person’s beliefs and experiences: Venezuela deserves respect, Venezuela wants us to love each other (as brothers and sisters), Venezuela deserves protection, Venezuela is sacred, Venezuela deserves the greatest honesty, etc. Each entailment may have further entailments, which result in a large net of entailments. The net may or may not fit our experiences of Venezuela. Lakoff and Johnson say that when the network fits, the experiences form a coherent whole as instances of metaphor. What we experience with the metaphor is like a reverberation down through the network of entailments that awakens and connects our memories of Venezuela, and serves as a possible guide for future experiences (140).

Another important concept of the theory of Lakoff and Johnson is metaphorical coherence. In his book Context and Connection in Metaphor, Ritchie states the following:

Lakoff and Johnson suggest that primary metaphors such as the orientational metaphors form coherent groups of metaphors that influence the development of new metaphors. Because happy, more, healthy, and so on are already 'up', a new concept such as social status will tend to be expressed in similar terms, even when it lacks a physical correlate. (35)

Ritchie explains that in any given culture, uses of metaphors tend to be coherent. For instance, in Western culture the metaphors "more is better" and "bigger is better" are coherent with "more is up" and "good is up." However, sometimes metaphors are contradictory. For example, "interest rates are up" is coherent with "more is up" but not with "good is up" (unless for bankers). The association that is given priority depends partly on the values of the culture. That is to say, "more is up" is such a prevailing metaphor in Western culture that it is difficult to imagine a sentence such as "interest rates went down from 6.25% to 7.00%."

Fallacies

In the afterword of the 2003 edition of Metaphors We Live By, Lakoff and Johnson argue that there are four fallacies concerning metaphorical thought that have persisted throughout history. These fallacies, they say, have hindered the understanding of the nature of metaphorical thought since the times of Aristotle (244-45).

The first fallacy is that metaphor is a matter of words, not concepts. As mentioned above, Lakoff and Johnson conceive metaphors as fundamentally conceptual in nature. For them, metaphorical language is secondary.

The second fallacy is that metaphors are based on similarity. Instead, they say, metaphors are generally based on cross-domain correlations that come from our experiences. This gives the impression that the two domains are similar although they are not. For example, in the following verse from the song *Dame tu consentimiento* written and interpreted by the Venezuelan-Argentine singer Ricardo Montaner, the conceptual metaphor TU CUERPO ES UN PAÍS shows how the two domains (body and country) are not really similar. Instead, the metaphor is based on correlations that come from our experiences with both domains:

Dame tu consentimiento, para recorrrerte toditita entera,
dame tu soberanía, quiero ver tus límites y tus fronteras,
dame tu consentimiento, para conquistarte con mis carabelas,
deja hacerme de tu orilla, porque la corriente a lo mejor me lleva.

The third fallacy is that all concepts are literal and that they cannot be metaphorical. In this respect, Lakoff and Johnson say that “even our deepest and most abiding concepts—time, events, causation, morality, and mind itself—are understood and reasoned about via multiple metaphors.” They cite the examples of time and space and argue that “one conceptual domain (e.g. time) is reasoned about, as well as talked about, in terms of the conceptual structure of another domain (e.g. space) (245).

The last fallacy is that rational thought is in no way shaped by our brains and bodies. According to Lakoff and Johnson, the system of conceptual metaphors is not arbitrary or simply dependent on experiences. Instead, it is shaped to a big extent “by the common nature of our bodies and the shared ways that we all function in the everyday world” (245).

Criticisms

There are different criticisms made to the cognitive linguistic metaphor theory that seem relevant to this study. Otto Santa Ana in his book Brown Tide Rising, mentions that cognitive linguistics in general, and metaphor theory in particular, have been criticized for the lack of agreement between many semanticists and cognitive scientists regarding the specifics of the cognitive structure (an individual's thought organization). He also states that many critics consider that Lakoff and Johnson have not elaborated a clear labeling procedure for conceptual metaphors, and that they have excessively expanded the traditional definition of a metaphor (44-45).

In their article, "Review of George Lakoff and Mark Turner's 'More than Cool Reason: A Field Guide to Poetic Metaphor,'" Jackendoff and Aaron question the LIFE AS FIRE mapping by saying that it does not necessarily characterize the set of metaphor that Lakoff suggests. Santa Ana defends Lakoff's position by stating:

Could a more general mapping, for example LIFE AS SOMETHING THAT GIVES OFF HEAT, or a more specific mapping, such as LIFE AS FLAME, be a more adequate characterization?

Santa Ana argues that Lakoff's idea when mapping metaphorical expressions to a conceptual metaphor is to allow central cases (to which things apply if they are perceived similarly), as well as less central cases. According to Santa Ana, the most appropriate mapping should encompass both more general and more specific metaphorical expressions, which is what Lakoff and Johnson attempt. In addition, he calls attention to the fact that the main purpose of metaphoric mapping is to serve as a mnemonic identification (45).

There are also objections to the idea that a given metaphorical expression is necessarily interpreted according to a single underlying conceptual metaphor. In an article entitled “Metaphors in Language and Thought: Falsification and Multiple Meanings,” Vervaeke and Kennedy analyze a group of orientational metaphors about money such as “to come into money,” “run out of money,” and “fall into debt.” They argue that these phrases are inflexible, indicating that it would be strange to extend them as “to come out of money,” “run in money,” and “rise out of debt” (Ritchie 40-41).

In this respect, David Ritchie, in his book Context and Connection in Metaphor, argues that people do say “to come from old money” or “rose out of poverty.” In addition, there are actual constraints on how we can extend literal usages. He cites Keyzar and Glucksberg and says that “we would not say sugar ‘rose out of the bowl.’” Ritchie concludes that “Vervaeke and Kennedy’s case against the idea of conceptual metaphor is largely unconvincing,” and points out the following:

Vervaeke and Kennedy’s general criticism of the idea that families of metaphorical expressions are organized around underlying conceptual metaphors is not supported by their examples, and every other example I have examined can similarly be vitiated by a more careful analysis. (41)

The concept of embodiment has also generated some criticism. For Lakoff and Johnson, embodiment implies that any physical experience of the body leaves a mark in the memory as it is processed by the nervous system. These marks are supposed to contribute to the build-up and understanding of elementary concepts, and to the recurrent refinement, modification, and interconnection of more complex and abstract concepts. Highly complex concepts are built up of combinations of less complex ones in a pyramid of concepts in which the simplest concepts are always understood metaphorically.

In this respect, Ritchie asserts that although Lakoff and Johnson provide strong evidence to support their claims, there is also evidence that concepts are often built-up and understood, to some extent, through linguistically mediated connections with other concepts. In addition, he mentions that the idea of a pyramid of concepts suggests that metaphors are always understood in a standard way, which does not seem to be the case. For example, sport metaphors and conflict metaphors are often used interchangeably, and are easily understood by people with no direct experience in those domains.

Despite his observations, Ritchie concludes that the evidence for the fundamental idea that abstract and complex concepts are understood in terms of basic bodily experienced concepts seems much stronger than any criticism that he has encountered in his research. In addition, he mentions that although Lakoff and Johnson may have exaggerated the role of embodied conceptual metaphors and downplayed the role of communication (including language) in the development of conceptual metaphors, this may have been a reaction to the dominance of strictly language-based accounts prior to the publication of Metaphors We Live By. In any case, subsequent research supports the idea that both processes play important roles (51-55).

Finally, in the afterword of the 2003 edition mentioned earlier, Lakoff and Johnson discuss some corrections and clarifications made to their work published in 1980. First of all, they acknowledge that the classification of metaphors into three types (orientational, ontological, and structural) was artificial. They say that:

All metaphors are structural (in that they map structures to structures); all are ontological (in that they create target domain entities); and many are orientational (in that they map orientational image-schemas). (264)

In addition, they acknowledge the importance of primary metaphor and admit that some of their previous analyses were incomplete. For example, in the case of the conceptual metaphor ARGUMENT IS WAR, they admit that most people learn about struggle before they actually learn about war. Therefore, the metaphor seems to originate in childhood with the primary metaphor ARGUMENT IS STRUGGLE. Lakoff and Johnson say:

All children struggle against the physical manipulations of their parents; and as language is learned, the physical struggle comes to be accompanied by words. The conflation of physical struggle with associated words in the development of all children is the basis for the primary metaphor ARGUMENT IS STRUGGLE. As we grow old, we learn about more extended and violent struggles like battles and wars, and the metaphor is extended via that knowledge. (265)

The last important clarification concerns the distinction between metaphor and metonymy. Lakoff and Johnson explain that while in a metaphor there is a neural coactivation of two domains, in metonymy there is a neural coactivation of two frame elements. In addition, in a metaphor the metaphoric mapping is multiple (two or more elements are mapped to two or more other elements), while in a metonymy there is only one mapping (generally, the metonymic source maps to the metonymic referent so that one item in the domain can stand for the other). A complex frame may consist of simple frames coming from two different conceptual domains. By analyzing the sentence “San Francisco is a half hour from Berkeley,” Lakoff and Johnson illustrate their point as follows:

Here the time (a half hour) stands metonymically for the distance. Notice that the time is from the Time domain and the distance is from the Space domain. This is a mapping of an element from one domain to an element of another. It is a metonymy, not a metaphor, because the two domains are part of a single, literal frame and because there is a single mapping, not a multiple mapping. (266)

Lakoff and Johnson compare the above sentence with the sentence “Chanukah is close to Christmas.” They say:

In the metaphor, Time is the target domain and Space is the source domain. In the sentence given, the relationship between the times of the two holidays is given metaphorically in terms of space (close to). Here time is the subject matter of the sentence and Space is not; it is only the conceptual source. In the metonymy case, the relationship between time and space (the time for the trip) is the subject matter of the sentence. (266)

Lakoff and Johnson conclude that when trying to differentiate between metaphor and metonymy, one must determine how the expression is used. It is not enough to look at the meaning of a single linguistic expression and to determine whether there are two domains involved. If the two domains form a single, complex subject matter used with a single mapping, then it is a metonymy. On the other hand, if domains can be used separately with a number of mappings, and where one of the domains forms the target domain while the source domain forms the foundation of inference (and other linguistic expressions), then it is a metaphor.

2.2.1. Critical Metaphor Analysis

Critical Metaphor Analysis (CMA) is one of the several approaches to discourse analysis that derive from CDA. It was developed by Jonathan Charteris-Black,⁴ in his book Corpus Approaches to Critical Metaphor Analysis, as an approach for analyzing metaphors in political discourse. The purpose of this methodology is to identify the covert intentions (possibly unconscious) and ideologies underlying language use.

CMA consists of three stages: identification, interpretation and explanation of metaphors. Metaphor identification deals with determining which metaphors are present in a text, and whether they show semantic tension between a literal source domain and a metaphorical target domain. Metaphor interpretation aims at determining the type of social relations that are constructed through the metaphors identified. Metaphor explanation deals with the way metaphors interact within the context in which they occur (34-35).

The identification stage can be divided into two parts: preliminary identification of metaphors, and confirmation of identified metaphors. The first part involves a close reading of the corpus with the aim of identifying its metaphors. This is done based on the criteria included in the following definition of metaphor proposed by Charteris-Black:

A metaphor is a linguistic representation that results from the shift in the use of a word or phrase from the context or domain in which it is expected to occur to another context or domain where it is not expected to occur, thereby causing semantic tension. It potentially has linguistic, pragmatic and cognitive characteristics. (21)

⁴ Jonathan Charteris-Black is a professor of linguistics at the University of the West of England. Most of his work is of empirical nature and his claims are based on evidence from language use. His studies draw on data from extensive language corpora.

Only those metaphors that satisfy these criteria are considered. That is to say, those metaphors showing incongruity or semantic tension (either at linguistic, pragmatic or cognitive levels) resulting from a shift in domain. Metaphors that are frequently used with a metaphoric sense as per the definition above are then classified as metaphor keywords (35).

The second part consists of selecting which of the metaphors identified in the preliminary stage will be included in the next step of the analysis. The basis for selecting a given metaphor is whether its use is generally, and not almost always, metaphorical. If its use is almost always metaphorical, it means that there is no longer semantic tension, in which case the metaphor is not included in the final analysis. Charteris-Black recurs to different types of corpora to determine if the word identified as a metaphor in the corpus of the study can be included in the final analysis.

To illustrate the identification stage, Charteris-Black gives the example of one of George W. Bush's most frequently used metaphors after the September 11 attacks: "to fight a crusade against terror." To determine whether this would be a metaphor that could be used in a critical metaphor analysis of Bush's speeches, Charteris-Black searches the phrase "crusade against" in the University of Birmingham's Bank of English. His results reveal that the most common words that accompany the phrase are "corruption" (n=12); "slavery" (n=7); "communism" (n=7); "abortion" (n=6); "Islam" (n=6); and "poverty" (n=5). (36)

Although the metaphorical use of "crusade against" is more frequent than the literal use (in the religious sense of the word), it is not frequent enough to say that there is not semantic tension when the phrase is used in cases such as "crusade against slavery" or

“crusade against corruption.” Therefore, it should be included in a critical metaphor analysis of Bush’s speeches. As Charteris-Black asserts:

Even though these metaphoric uses are more frequent in the corpus than literal ones, I propose that they are still metaphoric because a semantic tension results from the use of a term from the domain of religious struggle in non-religious domain of activity (i.e. social reform). (37)

Charteris-Black argues that any word has the potential to be a metaphor if the context makes it such, and if the speaker intends it such. Identifying metaphors this way enables us to determine the proportion of word’s uses that are metaphorical and to exclude literal uses from quantification. Additional corpora provide extensive context to decide whether there is semantic tension that justifies the inclusion of the metaphor in the analysis.

In the interpretation stage, Charteris-Black employs the cognitive linguistic metaphor theory developed by Lakoff and Johnson. This approach, described in the previous section, is based on the idea that the human mind is inherently embodied, thought is mainly unconscious, and abstract concepts are fundamentally metaphorical. Interpretation consists of establishing a relationship between metaphors and their cognitive and pragmatic factors. It involves the identification of conceptual metaphors, and the consideration of their roles in constructing socially relevant representations (38-39).

In the example of George W. Bush’s metaphor “to fight a crusade against terror,” Charteris-Black identifies the conceptual metaphor POLITICS IS RELIGION. He argues that “in order to make a claim for a conceptual metaphor, there is necessarily a need for other linguistic forms that are motivated by the same idea.” (38) Thus, for example, he

finds evidence of POLITICS IS RELIGION in Bush's famous phrase "the axis of evil," as well as in other phrases. Therefore, POLITICS IS RELIGION would be a good conceptual metaphor worth considering in the analysis of Bush's political discourse.

The last stage of CMA is based on the explanation of ideological motivations of language use. When we identify, in a political speech, the words that come from the semantic field of conflict, we find that some of them are literal while others are metaphorical. According to Charteris-Black, the mere fact of identifying a conceptual metaphor, such as POLITICS IS CONFLICT, not only constitutes a way of interpreting the interrelation between literal and metaphorical words, but it is also a way of explaining essential differences in ideological points of view. That is to say, one politician may often recur to POLITICS IS ETHICS while another one may use POLITICS IS CONFLICT. Each of these conceptual metaphors reveals a different ideological motivation.

Charteris-Black defines ideology as "a belief system through which a particular social group creates the meaning that justify its existence to itself." For him, ideology "is therefore an exercise in self-legitimization" (21). This definition expands Martin Seliger's conception of ideology, and fits the definition given by Robert Hodge and Gunther Kress.

Thus, in his book Ideology and Politics, Seliger defines ideologies as follows:

Sets of ideas by which men posit, explain and justify end and means of organized social action, and specifically political action, irrespective of whether such action aims to preserve, amend, uproot or rebuild a given social order. (14)

For Charteris-Black, ideology is more than that. It incorporates not only the systems of beliefs that are linked to political practice, but also those that are linked to

religious practice. This view matches the one proposed by Hodge and Kress in their book Language as Ideology, where ideology is defined as follows:

A systematic body of ideas, organized from a particular point of view. Ideology is thus a subsuming category, which includes sciences and metaphysics, as well as political ideologies of various kinds, without implying anything about their status and reliability as guides to reality. (6)

Although Charteris-Black argues that metaphor is an essential linguistic and cognitive resource used by politicians to justify their existence and self-legitimization, he acknowledges that they are not the only way of articulating ideology. Nevertheless, given that they draw on two domains by relating abstract concepts with our experience of concrete realities, they constitute a highly effective way of making an abstract ideology accessible.

In addition, as metaphors tap into emotions, they make abstract concepts seem personal and connected to human nature. Hence, metaphors play a crucial social role in forming and communicating ideologies. This is an essential element in creating discourses of legitimization and delegitimization.

Also, Charteris-Black points out that one of the most common ways to communicate ideology is through myth, which he defines as follows:

A myth is a story that provides an explanation of all the things for which explanations are felt to be necessary. These could be the origins of the universe, the causes of good and evil, the origin of the elements, of male and female, or anything else that is believed to be mysterious.” (22)

He concludes that a critical examination of political discourse is essential in order for a narrative explanation to be considered a myth rather than a reality. Therefore, the

analysis of the metaphors employed by politicians seems essential when distinguishing between myth and reality.

Finally, Charteris-Black stresses that in CMA the cognitive semantic approach needs to be complemented with both a study of the social context in which the speeches were given, and an analysis of the overall context of metaphor. This is part of the explanation stage. In addition, he argues that we cannot treat cognitive characteristics of metaphors in isolation from other persuasive rhetorical features in the context of the discourse. He states that in order to determine why one conceptual metaphor is preferred over another, we need to consider rhetorical issues such as the intentions of the political leader within specific speech-making contexts:

Metaphors are not a requirement of the semantic system, but are matters of speakers' choice. Cognitive semantics and Critical Metaphor Analysis are important linguistic contributions towards a theory of rhetoric for political communication." (Charteris-Black, *Politicians* 29)

To conclude this part, CMA will be illustrated by applying its principles to one of Chávez's metaphors cited by Lourdes Molero in her article "Revolución y oligarquía: la construcción lingüística y discursiva de los procesos e identidades en el discurso político venezolano." In the article, Molero cites a metaphor in which Chávez compares the Bolivarian force with "drops of water forming a stream."

In this case, we could interpret that the conceptual metaphor "The Revolution is a River" accounts for choices of words such as "drops," "water," and "stream." Assuming that in a given corpus being analyzed other metaphors support this conceptual metaphor, then we could perhaps explain that Chávez is using nature in general, and rivers in particular, to "soften" the concept of "revolution" (his political project).

Although there is an element of subjectivity in the stages of interpretation and explanation, this element can be significantly reduced when taking into consideration the context in which the metaphor occurs, and the contexts in which the speeches were given. In addition, by using a corpus approach to critical metaphor analysis, the element of subjectivity is also reduced given that many instances supporting the identified conceptual metaphor need to be found in order to consider this metaphor in the analysis. Finally, by classifying metaphors into source domain, the analysis can be improved as this allows us to determine trends and compare different speeches.

2.2.1. Methodology

This section describes the method used to analyze Chávez's speeches. In addition, it defines the corpus and provides a brief description of the historical context surrounding each speech. This serves as a way to justify the choice of texts included in the corpus of the dissertation.

As has become accepted practice in cognitive linguistics, and following the style conventions used by Lakoff and Johnson as well as by Charteris-Black, upper case is used in this dissertation to show the conceptual metaphors that underline Chávez's metaphors. Also, excerpts from political speeches will follow the MLA style instead of being shown in smaller font size, which seems to be the norm in most cognitive linguistics studies.

The Method

The method of analysis in this study follows the three steps described by Charteris-Black: identification, interpretation and explanation of metaphors. As mentioned before, Charteris-Black's method of analysis is partly anchored in the

cognitive semantic method toward metaphors developed by George Lakoff and Mark Johnson. The method of analysis is as follows:

First, metaphors drawn from the target domains “nation,” “Chávez’s Bolivarian Revolution,” and “opposition” are identified according to Charteris-Black’s definition:

A metaphor is a linguistic representation that results from the shift in the use of a word or phrase from the context or domain in which it is expected to occur to another context or domain where it is not expected to occur, thereby causing semantic tension. It potentially has linguistic, pragmatic and cognitive characteristics. (21)

Metaphors’ linguistic characteristics consist of three criteria: reification, personification and depersonification. Reification consists of referring to something that is abstract using a word or phrase that in other contexts is concrete. Personification consists of referring to something that is inanimate using a word or phrase that in other contexts refers to something that is animate. Depersonification consists of referring to something that is animate using a word or phrase that in other contexts refers to something inanimate.

The pragmatic characteristics of metaphors are based on the fact that they are incongruous linguistic representations⁵ which underlying purpose is to influence opinions and judgments through persuasion. The purpose is often hidden and reflects the intentions of the speaker within a specific context.

Metaphor’s cognitive characteristics are based on the fact that they are caused by a shift in the conceptual system. In this respect, Charteris-Black says that:

⁵ They are incongruous given that they cause semantic tension.

[T]he basis for the conceptual shift is the relevance of, or psychological association between, the attributes of the referent of a linguistic expression in its original source context and those of the referent in its novel target context. (21)

All words or phrases causing semantic tension and conceptualizing the nation, Chávez's Bolivarian Revolution, and the opposition are pre-selected for the analysis. They are classified per target domain and are tabulated for further analysis.

Then, those words or phrases that are generally (but not almost always) used metaphorically are considered. If their use is almost always metaphorical, it means that there is no longer semantic tension, in which case the metaphors are not included in the final analysis. CORDE (*Corpus Diacrónico del Español*), Google and Yahoo are used to determine whether words or phrases are generally (and not almost always) used metaphorically.

The next stage consists of interpreting the identified metaphors by finding the conceptual metaphors that underlie them. Conceptual metaphors are found by using the theoretical framework provided by cognitive linguistics. This stage also involves analyzing metaphors by target and source domains. Generally, this analysis includes tabulating the data for the purposes of comparison and trend finding.

The last stage consists of explaining the findings. This is carried out by taking into consideration the political, socioeconomic and cultural contexts of the texts being analyzed. The purpose here is to determine the relationship between the findings and the contexts in an attempt to uncover the ideological motivations behind the choice of metaphors.

The Corpus

The corpus includes one text per year, from Chávez's first year in office in 1999 until 2007. Texts were randomly selected and include seven speeches and two transcriptions of the weekly TV show *Aló Presidente*. The total size of the sample is approximately 185,772 words. Given that this research study aims at examining the relationship between metaphors and persuasiveness, and because it does not include a psychological analysis of the effects of Chávez's discourses on the receptors (the Venezuelan people), efforts have been made to include speeches that were given during critical historical moments, when speeches are more likely to have a higher content of persuasive intent.

The analysis in this study was carried out by periods of three years each: 1999-2001, 2002-2004, and 2005-2007. These periods are significant as they are framed by key historical moments in contemporary Venezuelan history. Thus, the first period goes from the moment Chávez took power through the year of the coup d'état in 2002, the second period goes from 2003 through the year of the recall referendum (won by Chávez) in 2004, and the last period goes from 2005 until the end of 2007, when Chávez lost the referendum on his proposal for a constitutional reform. The selected texts are as follows:

Text # 1

Text: Speech aired by all TV channels and radio stations in the country celebrating one hundred days in office.

Date: May 13, 1999.

Context: - Chávez's first one hundred days in office (the election was held on December 6, 1998, Chávez won the election with 56% of the votes, and took office on February 2, 1999).

- A referendum to hold a Constitutional Assembly was held on April 25, 1999 with an abstention of more than 60%. Chávez's proposal to hold the assembly won with 88% of the votes.

- A general election was held on July 25, 1999 to elect the members of the Constitutional Assembly. Chávez's coalition obtained approximately two thirds of the seats.

- On December 15, 1999, a referendum to vote for the new constitution was held, and the Constitution was approved with approximately 71% of votes.

Size: 20,409 words.

Text # 2

Text: Speech aired by all TV channels and radio stations in the country celebrating eighteen months in office.

Date: August 2, 2000.

Context: - Presidential and legislative elections were held on July 31, 2000. Chávez obtained approximately 59% of the votes.

- In October 2000, the National Assembly granted Chávez, for the second time,

special powers to rule by decree for one year.

Size: 9,985 words.

Text # 3

Text: Speech aired by all TV channels and radio stations in the country to raise several issues related to the Bolivarian Revolution.

Date: June 15, 2001.

Context: - Chávez took office for the second time on January 10, 2001.
- On December 10, 2001 a national strike (“paro nacional”) began.

Size: 28,875 words.

Text # 4

Text: Speech aired by all TV channels and radio stations in the country as a result of widespread unrest and political instability.

Date: April 11, 2002.

Context: - On April 9 and 10, general strikes were organized by the CTV (*Confederación de Trabajadores de Venezuela*).
- On April 11, 2002, peaceful marches organized by the government and the opposition ended up in a massacre.
- On April 12, 2002, Chávez was removed from power.
- On April 14, 2002, Chávez was returned to power.
- On December 3, 2002, the general strike known as *Paro Cívico Nacional* began. PDVSA, the national oil company, joined the strike.

Size: 9,674 words.

Text # 5

Text: *Aló Presidente* # 156 (aired by the state TV channel).

Date: June 13, 2003.

Context: - On February 2, 2003, the *Paro Cívico Nacional* ended.

- On March 6, 2003, by decree, Chávez appoints a new board of directors for PDVSA.
- On August 19, 2003, the Organization of American States received a petition of 3.5 million signatures calling for a recall referendum on Chávez's presidency, as guaranteed under the Constitution. This collection of signatures was not recognized as official by the government.
- On November 28, 2003, for the second time, the opposition collected signatures for a recall referendum on Chávez's presidency. The opposition claims to have collected 3.8 million signatures.

Size: 11,964 words.

Text # 6

Text: Speech given after a pro-government march called *Marcha por la paz y contra el paramilitarismo en Venezuela*, aired by the state TV channel.

Date: May 16, 2004.

Context: - On May 9, 2004, the government announced the capture of a group of paramilitaries in El Hatillo, a suburb of Caracas. This provoked the pro-government march of May 16.

- On August 15, 2004, Chávez won the recall referendum with 59% of the votes.

Size: 11,055 words.

Text # 7

Text: *Aló Presidente* # 241 (aired by the state TV channel).

Date: November 27, 2005.

Context: - On November 30, 2005, the main opposition parties, *Primero Justicia* and *Un Nuevo Tiempo*, withdrew their candidatures from the legislative elections. Other parties such as *Acción Democrática* (AD), *Partido Social Cristiano de Venezuela* (COPEI) and *Movimiento al Socialismo* (MAS) had previously withdrawn theirs.

- On December 4, 2005, with an abstention of 75%, the government coalition wins the legislative elections obtaining 100% of the seats in the National Assembly.

Size: 48,233 words.

Text # 8

Text: Speech to propose the creation of the *Partido Socialista Unido de Venezuela* held in the Teatro Teresa Carreño and aired by the state TV.

Date: December 15, 2006.

Context: - On September 2, 2006, Chávez proposes indefinite presidential re-election.

- On December 3, 2006, Chávez wins the presidential election against Manuel Rosales with 63% of the votes.

Size: 17,221 words

Text # 9

Text: Speech of presentation of the constitutional reform to the National Assembly aired by state TV.

Date: August 17, 2007.

Context: - On January 8, 2007, Chávez installed a new cabinet, replacing most of the ministers.

- On January 31, 2007, the Venezuelan National Assembly approved an enabling act granting Chávez the power to rule by decree on certain issues for 18 months.

- In May 2007 the Chávez government refused to renew the license of the nation's most popular television station, RCTV, alleging that the company had participated in his removal from power in 2002.

- On December 2, 2007, a referendum was held to pass constitutional amendments proposed by Chávez and his government. The reforms did not pass.

Size: 28,356 words

2.3. Summary

With the recent massive expansion of broadcasting and electronic media, political messages now reach an unprecedented number of people in Venezuela and beyond. As a result, the public sphere is increasingly filled with political messages that need to be interpreted and evaluated.

It could be argued that the ability to deal critically with political discourse is inherent to human beings and, for that reason, does not need to be studied. However, like any other human activity, political discourse deserves to be studied in its own right. After all, there are other natural human behaviors that are vastly studied. In addition, from an ethical point of view, it seems necessary to study political discourse given the general perception (in line with Socrates' position on rhetoric) that politicians and political

institutions use language to “persuade” or “manipulate” people, who are not necessarily aware of their “deceiving” intentions.

For the past nine years, Venezuela has been going through an unprecedented political transformation in her contemporary history. This political change, known as the Bolivarian Revolution, has provoked an interesting and favorable context for the analysis of political discourse. One of the main purposes of this dissertation is to contribute to the understanding of the construction and legitimization of the Bolivarian Revolution by analyzing the political discourse of its main proponent, Hugo Chávez.

In order to analyze Chávez’s political discourse, this study uses Critical Metaphor Analysis (CMA) as defined by Jonathan Charteris-Black in his book Corpus Approaches to Critical Metaphor Analysis. As CMA is partly based on the theoretical framework provided by the cognitive linguistic metaphor theory developed by George Lakoff and Mark Johnson in their book Metaphors We Live By, the study also employs their approach (in the interpretation stage of CMA). A corpus of approximately 185,772 words, covering nine consecutive years, and consisting of nine texts (seven speeches and two transcripts from *Aló Presidente*) has been analyzed.

Chapter 3: The Cult of Bolívar and Chávez's Bolivarian Revolution

Political ideology and discourse in contemporary Venezuela have roots that extend to the foundation of the country in the nineteenth-century wars of independence. Simón Bolívar, known in Venezuela as *el Libertador*, espoused the ideals of the Enlightenment, but exercised authoritarian powers as a military leader. His figure casts a long shadow over subsequent leaders, as do the seemingly contradictory sides of his persona: enlightened, yet authoritarian (Lynch xi).

In his book El Culto a Bolívar, published in 1969, Venezuelan historian Germán Carrera Damas states that Bolívar symbolizes the nation's emancipation and that his presence has become a national cult:

En la vida ideológica de Venezuela la constante presencia de quien simboliza su emancipación ha adquirido la forma de un culto. Dicho culto rendido a Bolívar constituye el eje del culto heroico venezolano, en su forma más general. (285)

He defines the cult of Bolívar as follows:

Por culto a Bolívar entendemos la compleja formación histórico-ideológica que ha permitido proyectar los valores de la figura del Héroe sobre todos los aspectos de la vida de in pueblo. (21)

Damas argues that the cult is so ingrained in Venezuelan society that when analyzing it for research purposes, one does not need to justify its existence. He says that the cult of Bolívar can be considered a historical fact:

La elección del tema queda legitimada por la existencia real del culto reconocida y proclamada por sus promotores, y por la persistencia y la extensión del mismo, según se desprende de nuestra indagación. Cabría

considerarlo, pues, un hecho histórico cuya objetividad se impone al investigador que intente comprender y explicar la evolución ideológica de Venezuela. (21)

In addition, Damas argues that the cult has become a historical need in Venezuelan society, “Su función ha sido la de disimular un fracaso y retardar un desencanto, y la ha cumplido satisfactoriamente hasta ahora” (42). Although Venezuelan politicians have always used the cult of Bolívar, Chávez and his regime have taken the cult to a new level by attributing him a new identity, the socialist Bolívar (Lynch 304).

Since Chávez first took office in 1999, the number of political texts that refer to Bolívar and his legacy has multiplied. The name of the country was changed from *la República de Venezuela* to *la República Bolivariana de Venezuela*, a Constitutional Assembly elaborated and passed *la Constitución Bolivariana*, Chávez’s arrival to power marked the beginning of *la Revolución Bolivariana*, his government created *el Plan Bolívar 2000* (to accelerate the process of change in the revolution), and *los círculos bolivarianos* were founded to defend the revolution (Chumaceiro 24).

No previous leader had invoked Bolívar so frequently and in so many different contexts as Hugo Chávez. According to an article written in 2001 by Mariusa Reyes for BBC Mundo, the Venezuelan historian Tomás Polanco Alcántara⁶ affirmed that: “Esto no se había visto antes. Esto está fuera de los límites propios de un homenaje al Libertador.”

In a speech given by Chávez on August 17, 2007, when he presented his constitutional reform plans to the National Assembly (which were rejected by referendum

⁶ Tomás Polanco Alcántara (1927-2002) was a Venezuelan historian and jurist. He wrote many biographies and history books on historical figures such as Bolívar, Páez, Guzmán Blanco and Francisco de Miranda. When he died the Venezuelan newspaper *El Universal* wrote: “Con él se va parte de la historia venezolana, esa que deja debajo del lápiz y el papel muchas páginas de reflexión sobre los protagonistas de la historia venezolana” (“Falleció”).

in December 2007), he used the proper name Bolívar, or the adjectives *bolivariano* or *bolivariana* in their singular or plural forms 111 times. In the same speech, he used the noun *pueblo* 86 times, the adjectives *social* or *socialista* (in their singular or plural forms) 53 times, and the nouns *Cristo* or *Dios* 6 times.

This chapter is divided into three parts: the first part traces Bolívar's life and legacy, the second part describes the imaginaries⁷ associated with the Bolivarian ideology throughout history, and the last part traces the history of the Bolivarian Revolution and attempts to identify its ideological content.

The purpose of the first two parts is to provide the necessary historical background to understand how Bolívar has become the symbol of the nation's emancipation (the founder of the republic) in the collective imaginary of Venezuelans. The purpose of the third part is to identify the different ideological sources and mechanisms that shape Chávez's Bolivarian Revolution. This is essential as it provides a context for the analysis of his discourse.

3.1. Simón Bolívar's Life and Legacy

Simón Bolívar was born in Caracas, Venezuela, on July 24, 1783. He was an educated creole from an affluent but troubled family. His father passed away when he was only three, and his mother died when he was nine. Although many preceptors were in charge of his education, two of them are often cited as being particularly influential in Bolívar's early years: Andrés Bello and Simón Rodríguez.⁸ At fifteen, Bolívar left

⁷ In this chapter "imaginary" is understood as the symbolic construct through which a national community (in this case the people of Venezuela) defines and represents itself. This definition is taken from the work of Venezuelan political sociologist Luis Ricardo Davila (Davila, *The Social and Political 2*).

⁸ Andrés Bello (1781-1865) is usually referred to as the intellectual father of South America. He was a Venezuelan writer, poet and scholar. Bello's works deal with such diverse subjects as law, philosophy, literary criticism, and philology. His *Gramática de la lengua castellana* of 1847, written after he moved to Chile, is still considered an authority in the field (Rudolph & Rudolph 83-84).

Caracas for Madrid where he studied with the Marquis of Ustáriz, a Venezuelan official who had made his career in Spain. Bolívar's biographers often say that Ustáriz also had a profound and deep influence on Bolívar's education (Carrera Damas, *Simón Bolívar Fundamental I* 33-34).

Bolívar remained in Spain until 1802, when he married María Teresa Rodríguez del Toro y Alayza, whose mother was from Spain and father from Venezuela. The young couple left Spain on June 15, 1802 and arrived in Venezuela on July 12. After a brief period together, María Teresa contracted a malignant fever and died on January 22, 1803. Years later, Bolívar said that the death of his young wife propelled him on the road to politics (Lynch 20-21).

Bolívar returned to Europe and lived for two years (from 1804 to 1806) in Paris, where he initially led a mundane life often described as full of pleasures and short-term romantic affairs. Some months later, still in Paris, he met Simón Rodríguez again and continued his education in politics (Carrera Damas, *Simón Bolívar Fundamental I* 34). This is considered the period of his intellectual awakening in political thought; he read the works of Montesquieu, Rousseau, Hobbes, Spinoza, Helvetius, Holbach and Hume. Also, during that period, his early admiration for Napoleon came to an end after seeing the French monarch crowning himself emperor on December 2, 1804. For Bolívar, Napoleon was no longer a symbol of liberty, but instead became an enemy of freedom (Lynch 24-28).

On August 15 1805, on the hill of Monte Sacro in Rome, and in the presence of his friend Fernando del Toro and his mentor Simón Rodríguez, Bolívar uttered the

Simón Rodríguez (1771-1854) was a Venezuelan pedagogue, writer and philosopher. He is also known as Samuel Robinson, a name that he adopted when living in Jamaica. He is known for having had a strong influence on Bolívar's political ideals (Rudolph & Rudolph 603-04).

famous *Juramento en el Monte Sacro*, in which he committed to fight against the Spanish yoke:

¡Juro delante de usted; juro por el Dios de mis padres; juro por ellos; juro por mi honor, y juro por mi Patria, que no daré descanso a mi brazo, ni reposo a mi alma, hasta que haya roto las cadenas que nos oprimen por voluntad del poder español! (Pérez Vila 860-61)

When Bolívar returned to Caracas at the end of 1806, after a short visit to the United States, he began to collaborate with anti-colonial groups. In 1808 the politics of Spain and its colonies underwent a dramatic shift when Napoleon deposed the Bourbon dynasty in Madrid and put his brother Joseph Bonaparte on the Spanish throne. Two years later, in March 1810, Bolívar participated in an aborted conspiracy led by his brother Fernando Bolívar and his relative the Marquis del Toro. As a result, he spent time in confinement and was not able to participate in the events of April 19, 1810, when a junta of creole notables, *el Cabildo de Caracas*, declared Venezuela's independence (Carrera Damas *Simón Bolívar Fundamental I* 34-35).

The cult of Bolívar began during his lifetime (Conway 24). In his biography of Bolívar, British historian John Lynch argues that Bolívar's legacy can be divided into three periods: revolution, independence and state-building (280). Before discussing the imaginaries that Venezuela's leaders and institutions have been using for political purposes since Bolívar's death, this chapter looks at the events in Bolívar's life that have shaped those imaginaries.

3.1.1. Bolívar the Revolutionary: 1810-1818

During the first period, which ran from 1810 until 1818, Bolívar is represented as a young and enlightened revolutionary leader who fought for Venezuela and New

Granada (today Colombia and Panama) (280). This representation is based on a series of historical events in which he played a leading role, including *el Manifiesto de Cartagena* (on August 27, 1812) where he analyzed why the first Venezuelan Republic had failed and why it needed to be liberated; *la Campaña Admirable* (between May 13-August 7, 1813) in which he led his troops toward Caracas and issued *el Decreto de Guerra a Muerte*;⁹ *la Carta de Jamaica* (on May 8, 1815) where he explained his view of the struggles against the Spanish domination and insisted on the need for liberation; and *la Proclamación de la Tercera República* (May 8, 1816), which resulted from his invasion of Venezuela on May 4, 1816 (Rudolph & Rudolph 98).

Bolívar's invasion of Venezuela in 1816 was possible thanks to his alliance with the Haitian leader Alexandre Pétion,¹⁰ who agreed to arm Bolívar's forces provided that he would abolish slavery in the continent. Thus, on June 2, 1816, Bolívar issued the declaration of freedom for the slaves, stating that they would fight for his forces. However, slavery was not abolished as a result of Bolívar's declaration, but was simply a way for Bolívar to obtain military support from Haiti (Lynch 97).

In spite of this, the imaginary that represents Bolívar as the revolutionary leader who freed the slaves has persisted in Venezuelan society and is often used by Venezuelan politicians and institutions (especially under Chávez's regime). In reality it was not until

⁹ This decree was a declaration issued by Bolívar on June 15, 1813 in Trujillo. It was a response to the crimes committed by Spanish forces after the fall of the First Republic. The decree is well known in Venezuela for its last paragraph:

Españoles y Canarios, contad con la muerte, aun siendo indiferentes, si no obráis activamente en obsequio de la libertad de América. Americanos, contad con la vida, aun cuando seáis culpables. (Carrera Damas, *Simón Bolívar Fundamental II* 22-24)

¹⁰ Alexandre Sabès Pétion (1770-1818) was a Haitian leader of his country's independence. He is remembered in Haiti for his liberal rule, and in South Americans for his support of Simón Bolívar during the independence struggle from Spain (Perusse 79-80).

1854, twenty four years after Bolívar's death, that slavery was abolished by President José Gregorio Monagas (Carrera Damas, *El Bolivarianismo-militarismo* 38-39).

3.1.2. Bolívar the Great Liberator: 1819-1826

In the second period, which ran from 1819 until 1826, Bolívar became known throughout the continent as the great universal liberator, the patriot who was able to see beyond national boundaries and take the revolution to its limits (Lynch 280). This can be attributed to his independence efforts during the period. He secured the independence of Colombia with *la Batalla de Boyaca* on August 7, 1819, and that of Venezuela with *la Batalla de Carabobo* on June 24, 1821 (Rudolph & Rudolph 98). In addition, together with Marshal Antonio José de Sucre,¹¹ he contributed to the independence of Ecuador, which was sealed at *la Batalla de Pichincha* on May 24, 1822. He also collaborated with José de San Martín¹² in the independence of Perú, which is attributed to two battles: *la Batalla de Junín* on August 6, 1824 and *la Batalla de Ayacucho* on December 9, 1824 (Bakewell 395-96). Finally, in collaboration with Marshal Sucre and the creole elites of Upper Perú (today Bolivia), he declared the country's independence by founding the Republic of Bolivia, ostensibly named after him (Klein 100).

It is during the second period that the cult of Bolívar peaked in his lifetime. However, representations of Bolívar during the Wars of Independence were not defined by nationalistic ideals. While post-independence nationalism tries to define a nation and a people, pre-independence Republicans struggled to define how the newly freed territories

¹¹ Antonio José de Sucre (1795-1830) was a Venezuelan patriot who served as Bolívar's chief lieutenant. He became the first constitutionally elected leader of Bolivia (Lofstrom 955-56).

¹² José de San Martín (1778-1850) was an Argentine soldier and statesman who played a leading role in the revolutions against Spanish rule in Argentina (1812), Chile (1818), and Peru (1821). (Halperin Donghi 112-116)

should be allocated as republics and under which constitutional system they should be ruled. Pre-independence intellectuals were more concerned with protecting the revolution's gains and establishing law and order than with theorizing the social and cultural mix that made a nation. Patriots' construction of the independence was not expressed in terms of separate national states, but rather in the political sense of a common battle against tyranny (Conway 24).

Other important events during the second period include Bolívar's efforts to unite the newly freed states. Thus, in 1819, Bolívar called a congress (*el Congreso de Angostura*) where he set forth a new constitution for the freed territories (Rudolph & Rudolph 99). Together with Antonio Nariño and Francisco de Paula Santander,¹³ Bolívar set forth another constitution in 1821 at *el Congreso de Cúcuta* and created Gran Colombia, which comprised the territories of Nueva Granada (Colombia and Panama), Venezuela, and later Ecuador (Rudolph & Rudolph 168-169). After these victories, Bolívar first achieved the status of *Padre de la Patria* in Venezuela (Lynch 299).

It is interesting to note that Bolívar's representation as *Padre de la Patria* not only implies the notion that he is the absolute leader of the nation, but also that he is its creator and supreme maker. It implies exclusive greatness and originality (Carrera Damas, *Culto a Bolívar* 85). All these implications place him at an unattainable and almost sacred level, closer to God than to humans. The representation as *Padre de la Patria* is at the source of Bolívar's deification.

¹³ Antonio Nariño (1756-1823) was a Colombian patriot, president of the province of Cundinamarca (today Colombia). He was a leader of the independence and "a dissident since the 1780s" (Lynch 65).

Francisco de Paula Santander (1792-1840) was a Colombian soldier and statesman who fought with Bolívar in the Independence Wars. He was president of Nueva Granada from 1833 until 1837 (Ayala Poveda 70).

3.1.3. Bolívar the Statesman: 1827-1830

During the third period, which ran from 1827 to his death in 1830, Bolívar gained renown as a statesman, as a great leader who tried to establish institutions, ensure security and promote reform (Lynch 280). This is mainly based on the following events: Bolívar's unsuccessful proposition in 1826 at *el Congreso de Panamá*, which was an attempt to form a broader federation of newly freed territories; his efforts in calming a secessionist movement led by José Antonio Páez against the government of Bogotá in April 1826; and his unsuccessful attempts to reform the Cúcuta Constitution through the *Convención de Ocaña* that took place between April 9 and June 10, 1828 (Rudolph & Rudolph 99-100).

After the failure in Ocaña, Bolívar became dictator of Gran Colombia on August 27, 1828. On September 25, 1828 there was an unsuccessful attack against his life. This was followed by a short war against Peru led by him. Eventually, the secessionist movement tore Gran Colombia apart, provoking the separation of Venezuela in December 1829, and of Ecuador in 1830. Bolívar resigned from the presidency on January 20, 1830, and died of tuberculosis on December 17, 1830 in the Colombian town of Santa Marta. He died practically alone and penniless (Rudolph & Rudolph 100).

3.2. The Bolivarian Ideology in Venezuela Society: History and Imaginaries

The Bolivarian ideology, also called Bolivarianism, is based on the cult of Bolívar that was established more than 150 years ago. Although this cult began to develop during Bolívar's life as a result of his leadership and victories, it was not until 1842 that the cult was solemnly created when his remains were repatriated from Colombia to Venezuela (Carrera Damas, *El Culto a Bolívar* 287).

The cult of Bolívar has been present in Venezuelan society since its emergence in 1842, showing different degrees of intensity throughout its history. Shortly after its

establishment, the cult went from being *un culto del pueblo*, promoted by the people, to being *un culto para el pueblo*, promoted for the people by governments and institutions. As a result of its institutionalization, the cult became a sort of ideological universe in which Venezuelan society has existed and still exists, a universe with historical legitimacy that benefits from strong social fervor and respect (Carrera Damas, *El Bolivarianismo-militarismo* 38).

The cult of Bolívar allows politicians and institutions to use Bolívar's social imaginaries for political purposes. In an article entitled "Bolívar, imaginario social," Venezuelan historian José Pascual Mora García¹⁴ summarizes the current collective representation of Bolívar in Venezuelan society as follows:

El Bolívar que habita en el imaginario colectivo es el que alimenta el imaginario político. Ese Bolívar al que el pueblo le canta, ese Bolívar que acompaña al pueblo en sus marchas, ese Bolívar que llora con el pueblo, ese Bolívar al que el pueblo le reza, ese Bolívar que se alegra con el pueblo, ese Bolívar que el pueblo lleva en procesión; ese Bolívar es el Bolívar que permite conectar al pueblo con el ideal político. Bolívar devenido en imaginario político es el héroe salvador que le devuelve la soberanía popular, es el héroe que le da mercados a precios solidarios, es el héroe que le crea una universidad para todos, es el héroe que alimenta la esperanza del pobre y del que sufre. (103)

Several imaginaries can be inferred from this quote: Bolívar the militant (e.g. "ese Bolívar que acompaña al pueblo en sus marchas"), Bolívar the saint (e.g. "ese Bolívar que el pueblo lleva en procesión"), Bolívar the liberator (e.g. "es el héroe salvador que le

¹⁴ Dr. José Pascual Mora García is a professor of history at Universidad de los Andes, Táchira.

devuelve la soberanía popular [al pueblo]”), or Bolívar the populist (e.g. “es el héroe que le da mercados a precios solidarios”). These are examples of the social imaginaries that are available to Chávez, or to any other contemporary leader in Venezuelan society, to serve specific political interests.

Imaginaries change with time; they cannot be imposed or decreed (Mora 107). However, they can be exploited and manipulated in discourse. Since Bolívar’s death, politicians have been using imaginaries of Bolívar for political purposes. When the book El Culto a Bolívar was published in 1969, Carrera Damas identified four major imaginaries associated with Bolívar at different moments in history: Bolívar the demigod, Bolívar the revolutionary, Bolívar the democrat, and Bolívar the Catholic. In the following sections these four imaginaries will be discussed in detail and related to the historical circumstances in which they existed.

3.2.1. Bolívar the Demigod

The Venezuelan Federal War, a five-year period (1859-1863) of intense fighting between government’s forces (the Centralists) and the opposition (the Federalists), left the country in ruins. There were 2,467 guerrilla actions, 327 battles and approximately 200,000 deaths (11% of the total population) (Davila 15). This situation created the optimal conditions for the development of *caudillismo*,¹⁵ which in turn nurtured itself by Bolívar’s legacy.

¹⁵ In his book El Poder Político en Venezuela, Ramón Guillermo Avelado writes:

La escasa integración nacional de un territorio relativamente extenso e incomunicado, la carencia de un poder central eficaz y la disolución del orden preexistente sin que sea reemplazado por uno nuevo, el señorío de la violencia en un país donde no hay todavía una institución militar propiamente dicha, la progresiva ausencia de las clases sociales dominantes y el deterioro de la economía que había sido, todo confluye en la aparición y desarrollo del fenómeno caudillista. (61)

The Venezuelan dictator Antonio Guzmán Blanco¹⁶ is often credited as the precursor of the institutionalization of the cult of Bolívar. In 1874 he erected the equestrian statue that sits in Caracas' Plaza Bolívar, in 1874 he transferred Bolívar's remains from the cathedral to the newly created National Pantheon, in 1879 he decreed the publication of O'Leary's *Memorias* in order to exalt Bolívar's legacy, and in 1883 he commemorated the centenary of Bolívar's birth with an extraordinary display of political speeches, publications, celebrations and new statues (Lynch 301-02).

Although the first Venezuelan president who came close to deifying Bolívar was Juan Vicente González, who in 1840 recommended that all Venezuelans should adore and imitate Bolívar's life, it was Guzmán Blanco's cult of Bolívar that described him as a "hombre incomparable" and as a "Semidios." He said:

Bolívar, como Jesucristo, no es un héroe de la fantástica epopeya. Bolívar es el libertador del Continente, el Creador de las Repúblicas Americanas, el Padre de los ciudadanos libres. Nació para eso; para eso lo dotó Dios de todos los talentos, de valor, de audacia y perseverancia incomparables en toda la redondez de la tierra, como en el pasado, en el presente y en el porvenir. (Carrera Damas *Culto a Bolívar* 195-96)

It is interesting to note that Guzmán Blanco's ideological position was quite far from Bolívar's ideals. Guzmán Blanco, a positivist who founded the Liberal Party, attempted to create a national church that would be independent from the Vatican. This is something that Simón Bolívar specifically opposed earlier in the nineteenth century. This contradiction shows the gap that often exists between Bolívar's real ideals and the imaginaries associated with him (Lynch 302).

¹⁶ In office in three different terms: 1870-1874, 1877-1884, and 1886-1888.

3.2.2. Bolívar the Revolutionary

The different representations of Bolívar that manifest themselves at different moments in history do not only depend on the efforts of governments and institutions that promote them, but also on the socio-political circumstances of the time when they appear. For instance, in 1903, after seventy-three years of continual and brutal revolutions, Bolívar was not being represented as a revolutionary. The Federal War (*la Revolución Federal*), was one of the 39 violent revolutions that occurred in Venezuela in the period that went from 1830 until 1903 (Aveledo 23).¹⁷

Revolutions were discredited and no longer represented a remedy in Venezuelans' consciousness. Instead, they were thought as the source of all the problems that the country was facing. In this respect, the Venezuela historian Tulio Febres Cordero noted in 1909 that:

La causa es evidente. Ni los terremotos, ni las pestes, ni las sequías, han arrebatado el número de vidas ni causado jamás en Venezuela tanto estrago como una sola de nuestras pasadas revueltas civiles; revueltas que dejan ensangrentado el territorio, desecadas las fuentes de riqueza y, lo que es más funesto, viciadas las costumbres públicas y relajado el sagrado respeto a las instituciones y a las leyes. (Carrera Damas *Culto a Bolívar* 159)

Given the brutality of the many revolutions that took place in Venezuela during most of the nineteenth century, it is likely that this anti-revolution sentiment rose long

¹⁷ Each of those 39 revolutions fulfilled all of these conditions: a) took place at a national scale, b) its purpose was to overthrow the national government, c) last at least 30 days, d) involved at least 500 men on each side (Aveledo 23).

before 1903. In this respect, Cecilio Acosta, a well-known Venezuelan writer and journalist, noted in 1868 the following:

[E]s verdad que las revoluciones llevan y dejan inoculadas ideas nuevas; pero también lo es que echan abajo lo antiguo e imponen el trabajo de reconstruir. Son admirables como providenciales, son justas como derecho; pero en uno y otro caso, son una convulsión que trastorna, aunque sea un remedio que regenera. (quoted in Carrera Damas, *Culto a Bolívar* 158)

At other moments in history, however, Bolívar has been represented as a revolutionary. According to Carrera Damas, as noted as early as 1969 in El Culto a Bolívar, representing Bolívar as a revolutionary constitutes perfection as far as popular aspirations are concerned: “El Bolívar creado para el pueblo es también un revolucionario, y al serlo representa la perfección en este orden de las aspiraciones populares” (237). Despite this, Carrera Damas clarifies that in fact most historians do not consider Bolívar’s legacy a real revolution:

Mas a poco que veamos críticamente la historiografía venezolana resulta ser un revolucionario sin revolución, pues esa historiografía admite casi generalmente que la obra histórica de ese revolucionario no puede ser considerada, en rigor, como una revolución. (Carrera Damas, *Culto a Bolívar* 237)

Although Bolívar’s life and legacy do not fit the traditional definitions of the life and legacy of a revolutionary, this has not impeded politicians to continue representing him as a revolutionary (237). This shows once again the gap between historical realities and subsequent imaginaries.

In a conference on poverty of the Organization of American States in October 2003, President Chávez said: “cuando nosotros hablamos de Bolívar estamos rescatando al verdadero Bolívar, es decir, al Bolívar revolucionario.” (Chávez, *Alocución* 2003). Chávez’s use of the imaginary of Bolívar the revolutionary is just another example of the trend noted by Carrera Damas in 1969.

3.2.3. Bolívar the Democratic Leader

The imaginary of Bolívar as a democratic leader has existed since the second half of the nineteenth century. Carrera Damas mentions that as early as 1858, twenty eight years after Bolívar’s death, he was already being represented as a democratic leader. For instance, in *la Convención Nacional de Valencia* of 1858, when the articles for a new Constitution were being drafted and discussed, Francisco Machado¹⁸ said:

El Padre de la Patria, el gran Bolívar, que muchas veces fue calumniado de profesar principios monárquicos fue, sin duda, mucho más demócrata que algunos de los que aquí ostentan practicar la democracia. Lo prueba su discurso, al presentar, al Congreso del Perú, el proyecto de Constitución que se llamó Boliviano. (235)

The imaginary of Bolívar as a democratic leader emerged as a mechanism to offset the accusations that were made against him after he became dictator of the Republic of Colombia in 1828. This imaginary, which has survived many dictatorships since the nineteenth century, is considered by historians as one of the strongest portraits of Bolívar in Venezuelan society. In this respect, Carrera Damas says “a juzgar por los testimonios, parece haber alcanzado un altísimo grado de aceptación” (234).

¹⁸ Francisco Machado was one of the deputies (representative of the Carabobo Province) who participated in the drafting and discussions of the 1858 Constitution of Venezuela.

By the late 1930s, and after the three-decade dictatorship of Juan Vicente Gómez, the imaginary of the democrat Bolívar was consolidated. Carrera Damas quotes Carlos Irazábal's¹⁹ book Hacia la democracia, published in 1939, where Bolívar is represented as a democrat despite his well-known admiration for the English monarchic system:

[E]l sistema de gobierno inglés, no obstante su forma monárquica, era para entonces, como todavía lo sigue siendo, un régimen más democrático que las monarquías absolutas y que las repúblicas, formales solamente, de nuestros países. Por su contenido democrático, por la estabilidad política que Bolívar consideraba efecto de ese sistema de gobierno, fue por lo que Bolívar quiso imitarlo en las naciones recién creadas. Pero en ningún caso por simpatías hacia gobiernos autocráticos.... En consecuencia, la simpatía de Bolívar por la forma de gobierno inglés no prueba su vocación autocrática, sino antes bien, su indiscutible vocación democrática. (quoted in Carrera Damas, *Culto a Bolívar* 236)

In this respect, Carrera Damas concludes that Irazábal's argument, deeply based on the imaginary of the democrat Bolívar, turns the accusatory evidence against Bolívar into proof of Bolívar's democratic vocation: "Así, la prueba acusatoria se vuelve favorable al acusado y éste sale fortalecido en su significación democrática (236).

As the imaginary of the democratic Bolívar was being consolidated, Bolivarianism was gradually endowed with doctrine. This happened during the dictatorship of General Eleazar López Contreras, in power between 1935 and 1941. López Contreras institutionalized Bolivarianism as a state policy and described it as a patriotic ideological alternative to democratic ideas, called by him "ideas exóticas," and

¹⁹ Carlos Irazábal (1907-1991) was a Venezuelan historian, representative of the Marxist historiography.

often referred to as “communist ideas” (Carrera Damas, *El Bolivarianismo-militarismo* 122-23).

It is worth noticing that the imaginary of the democratic Bolívar was used by Contreras as a way to endow Bolivarianism with an anti-democratic doctrine. This is another example of how imaginaries can be shaped for political purposes. Venezuelan governments, both dictatorial and democratic, have repeatedly used the cult of Bolívar to serve their political objectives. This has been possible, according to Carrera Damas, because in Venezuela the cult of Bolívar has become “la segunda religion” (Carrera Damas, *El Bolivarianismo-militarismo* 123).

3.2.4. Bolívar the Catholic

The imaginary of the Catholic Bolívar has been more difficult to create than the others due to his well-known conflicts with the Church. In 1812, for example, he threatened Archbishop Narciso Coll y Pratt for his anti-independence activities. In addition, Bolívar was ex-communicated in 1814 by the Catholic Church in Bogotá (238-39).

Nevertheless, there are some elements in Bolívar’s relationship with the Church that contributed to the emergence and reinforcement of the imaginary of the Catholic Bolívar. For instance, in the last years of the war, Bolívar held diplomatic relations with the Church for tactical reasons (239) and, during his dictatorship between 1828 and 1830, suspended a series of earlier liberal policies, especially in the area of ecclesiastical reform (Bushnell 184).

The celebrations of the centenary of Bolívar’s death constitute a prime example of the consolidation of the imaginary of the Catholic Bolívar. On December 17, 1930, the Venezuelan Catholic Church rendered homage to Bolívar with the following words:

Como venezolanos, bástenos decir que vemos en él al Padre de la Patria; como Obispos, reconocemos en él al insigne Magistrado, benefactor de la Iglesia: recordemos, agradecidos, el especialísimo empeño que puso, durante las angustias de la magna guerra, a fin de que los pueblos no se vieran privados de Pastores, “en orfandad” como él mismo dijo con poética ternura; el respeto y acatamiento con que siempre trato a nuestros Hermanos en el Episcopado y gloriosos Predecesores nuestros, los Obispos de la Gran Colombia.” (Carrera Damas, *Culto a Bolívar* 239)

3.3. Hugo Chávez’s Bolivarian Revolution: History and Ideologies

In 1983, sixteen years before Chávez’s arrival to power, Venezuela commemorated the bicentenary of Bolívar’s birth with one of the biggest manifestations of Bolivarianism ever seen. Luis Herrera Campins’ government²⁰ organized an enormous display of celebrations that included the military, politicians, the arts, universities, business, sports and all sectors of society. All kinds of events took place across the country to pay homage to its liberator. Hundreds of conferences, performances, publications, receptions and sports events took place in Venezuela in 1983 (Lynch 303-04)

Despite the collapse of the Venezuela’s financial system that year, the government spent millions of dollars organizing international congresses, hosting the Pan-American Games, opening a new subway system in Caracas, and organizing key presidential elections. Once again, the cult of Bolívar had been used to serve political

²⁰ Luis Herrera Campins (1925-2007) was a member of the political party COPEI. He was president of Venezuela between 1979 and 1983.

interests: as a strategy to distract attention from the collapse of the financial system during an election year.

Jaime Lusinchi, a medical doctor from the *Acción Democrática* party, won the 1983 election. He stayed in power until 1988. His government is often associated with corruption scandals and unfulfilled promises. In 1988, Carlos Andrés Pérez, also from *Acción Democrática*, is elected for the second time president of Venezuela. He was able to win the election although his first government (1973-1978) was known for the consolidation of corruption and the two-party system (Dávila 260-61). Carlos Andrés Pérez's second time in office propelled a series of events that would eventually take Bolivarianism to a whole new level: the emergence of Chávez's Bolivarian Revolution and the birth of "Bolívar the socialist" (Lynch 304).

The Bolivarian Revolution is the political system proposed by Hugo Chávez and his supporters as a vehicle to arrive to the so-called "twenty-first century socialism." Its origins can be traced to a clandestine movement initiated by Hugo Chávez in 1977 when he was a sub-lieutenant in the Venezuelan army. The system is not shaped by any unique ideology, but rather by a wide range of ideological sources that are often described as contradictory (Carrera Damas, *El Bolivarianismo-militarismo* 125-125; Davila, *The Social and Political* 7; Lupi & Vivas 87). Although there seem to be some indicators as to what supporters of the Bolivarian Revolution mean when they speak about "twenty-first century socialism," there is no real consensus about what it is. Chávez himself claims that the vagueness of the definition is deliberate (Wilpert 237).

The next section starts by tracing the history of the Bolivarian Revolution from the creation of the *Ejército de Liberación del Pueblo de Venezuela*, a clandestine organization founded by Chávez in 1977, to the emergence of *Movimiento Quinta*

República, Chávez's political party. In the second part of the section, an attempt is made to identify various ideological sources that have influenced the Bolivarian Revolution since its creation.

3.3.1. History of the Bolivarian Revolution

The origins of the Bolivarian Revolution can be traced back to a clandestine organization called *Ejército de Liberación del Pueblo de Venezuela* created in 1977 by Chávez and by a few of his friends from the military. The organization was originally associated with the famous guerrilla leader Douglas Bravo. However, this association broke as a result of differences between Chávez and Bravo about the way to arrive to power. While Bravo supported an alliance between civilians and the army, Chávez thought that civilians should only participate in the process once they had obtained power (Langue 16-17).

In an article entitled “El Movimiento V República en Venezuela: fuerzas y debilidades,” the Venezuelan political scientist Valia Pereira Almao²¹ provides a detailed account of the history of Chávez's political movement. She states that the organization was founded with the purpose of rejecting established practices inside the military: corruption, political alliances, attacks against guerrilla groups causing civilian casualties, and friction between old and new generations of army officials (3).

The *Ejército de Liberación del Pueblo de Venezuela* was called *Ejército Bolivariano Revolucionario 200* after Chávez and three other officers, Felipe Acosta Carles, Raúl Baduel and Jesús Urdaneta, swore an oath on December 17, 1982, underneath the legendary tree *Samán de Güere*, where Bolívar is believed to have rested

²¹ Valia Pereira Almao is a researcher at El Instituto de Estudios Políticos y Derecho Público of Universidad del Zulia in Maracaibo, Venezuela.

just before the battle that sealed Venezuelan independence (*la Batalla de Carabobo*). The officers repeated an adaptation of the words Bolívar had uttered in the hill of Monte Sacro in 1805 when he swore to liberate Venezuela from the Spanish yoke. They changed the last line of the oath and said “hasta que se haya roto las cadenas que nos oprimen por voluntad de los poderosos” instead of “hasta que haya roto las cadenas que nos oprimen por voluntad del poder español” (González, “El Samán que nunca fue” 1):

¡Juro delante de usted; juro por el Dios de mis padres; juro por ellos; juro por mi honor, y juro por mi Patria, que no daré descanso a mi brazo, ni reposo a mi alma, hasta que haya roto las cadenas que nos oprimen por voluntad de los poderosos!

From that point on, the movement defined itself as being founded upon the ideals of Simón Bolívar, leader of the Venezuelan independence, Simón Rodríguez, Bolívar’s mentor, and Ezequiel Zamora,²² a liberal and federalist leader during the Venezuelan Federal War. This combination of ideological sources is what is known as *El árbol de las tres raíces* in the rhetoric of the Bolivarian Revolution. The number 200 referred to the 200 years of the birth of Simón Bolívar that were going to be celebrated on July 24, 1983. (Pereira 3-4).

In December 1988, Carlos Andrés Pérez was elected president of Venezuela for the second time. His first term in office (1973-78) was a period of an immense oil boom, growing corruption and the consolidation of the two-party system. Pérez's election was the first re-election in Venezuela since the country entered its democratic phase in 1958.

In February 1989, widespread rioting known as *el Caracazo* erupted in response to an

²² Ezequiel Zamora (1817-1860) was a Venezuelan liberal and federalist leader. In 1846, he led the rising of Gumba, a Venezuelan town, under the slogan «tierra y hombres libres». He fought for the rights of land workers and demanded equal distribution of resources. He was known as “General del Pueblo Soberano” and led an army of countrymen in many battles (“Zamora, Ezequiel”).

increase in public transportation fares as part of the neoliberal policies of Pérez's government (Davila, *L'Imaginaire Politique* 261).

Due to internal differences within the organization, the name of the *Ejército Bolivariano Revolucionario 200* was changed to *Movimiento Bolivariano Revolucionario 200* (also known as *MBR-200*). It was not until after *el Caracazo*, on February 27 and 28, 1989, when riots were brutally aborted by the army under orders of President Carlos Andrés Pérez, resulting in thousands of civilian deaths, that the MBR-200 started to forge links with civil sectors and leftist parties (Pereira 4).

Although MBR-200 did not play any role in *el Caracazo*, it provided them with the opportunity to establish key political alliances with leftist leaders. In addition, *el Caracazo* became in Chávez's rhetoric a justification for MBR-200's subsequent coups d'état. Thus, in February 2008 Chávez said:

El estallido social que tuvo lugar los días 27 y 28 de febrero de 1989, conocido como el Caracazo, constituyó un hecho que aceleró la insurgencia militar y los acontecimientos del 4 de febrero (4F) de 1992, fecha en la que más de 2 mil hombres se alzaron en armas e intentaron dar respuesta al descontento popular deponiendo el Gobierno de entonces, liderado por Carlos Andrés Pérez. (quoted in Moreno)

The coups d'état attempted by MBR-200, and led by Chávez on February 4, 1992, failed and resulted in 18 deaths and 60 injured ("Profile: Hugo Chávez."). This event launched Chávez's career as a major figure in Venezuelan politics. Shortly after the coup attempt, Chávez's addressed his comrades on national television and gave one of his most famous speeches to date. The 169-word speech, which was a call to his comrades to surrender, is commonly known as the *Por ahora* speech:

Primero que nada quiero dar buenos días a todo el pueblo de Venezuela, y este mensaje bolivariano va dirigido a los valientes soldados que se encuentran en el Regimiento de Paracaidistas de Aragua y en la Brigada Blindada de Valencia. Compañeros: Lamentablemente, por ahora, los objetivos que nos planteamos no fueron logrados en la ciudad capital. Es decir, nosotros, acá en Caracas, no logramos controlar el poder. Ustedes lo hicieron muy bien por allá, pero ya es tiempo de reflexionar y vendrán nuevas situaciones y el país tiene que enrumbarse definitivamente hacia un destino mejor. Así que oigan mi palabra. Oigan al comandante Chávez, quien les lanza este mensaje para que, por favor, reflexionen y depongan las armas porque ya, en verdad, los objetivos que nos hemos trazado a nivel nacional es imposible que los logremos. Compañeros: Oigan este mensaje solidario. Les agradezco su lealtad, les agradezco su valentía, su desprendimiento, y yo, ante el país y ante ustedes, asumo la responsabilidad de este movimiento militar bolivariano. Muchas gracias.

It is pertinent to note that the phrase, *Por ahora*, is commonly used by Chávez and his supporters as a symbol of the so-called “unstoppable” quality of the revolution. For instance, in December 2007, after Chávez lost the referendum to change the Constitution, which among other things would have given him the possibility to be reelected in 2012, the government put up signs all over Caracas that read “*Por ahora*” The text was red and all in capitals, followed by ellipses: “POR AHORA...” (Poliszuk).

After the coup of February 1992, Chávez was imprisoned for the role he played in it. While he was in prison, on November 27, 1992, another coup took place and also failed. He spent two years in prison and was later pardoned by President Rafael Caldera.

On April 17, 1997, the MBR-200 held its National Assembly and decided to choose the democratic path as a way to arrive to power. On October 21 of the same year, the *Movimiento Quinta República (MVR)* was registered in Caracas in accordance to the prevailing legislation on creation of political parties. Hugo Chávez was its general director and main leader. He was supported by family, friends and some civilians from national leftist circles (Pereira 5-6). In his speech of December 15, 2006, which is part of the corpus of this study, the president told the story of how he first thought of the name:

[C]uando vimos que las circunstancias se tornaban de alguna manera favorables [...] entonces fue que decidimos lanzar la candidatura de este humilde servidor de ustedes a la presidencia de la república, y crear un partido para inscribirlo en el Consejo Electoral, porque allá no aceptaban el nombre de MBR-200 porque la ley prohíbe utilizar el nombre de Bolívar en un partido político. Y en un juego de palabras, una madrugada recuerdo que se me ocurrió, bueno, MVR para que sonara igual, y además coincidía con lo de V República parte de nuestro proyecto.

Chávez was MVR's candidate in the 1998 presidential elections. He was backed by a coalition of nine parties, including the traditional *Movimiento al Socialismo (MAS)* and the *Partido Comunista Venezolano (PCV)*. He won with 56.45% of the votes, followed by Henrique Salas Romer (39.49% of the votes), which represented a coalition of four political parties, including the two protagonists of the two-part system: *Acción Democrática* (a member of the Socialist International) and *Comité de Organización Política Electoral Independiente* (a member of the Christian Democrat International) (Langue 36).

In the 2006 speech mentioned above, Chávez called on his coalition partners into his new single party, the PSUV. He said that this would help him to accelerate the pace of his socialist revolution. Opposition parties reacted with distrust, citing the example of Cuba as a one-party state. Many of Chávez's coalition partners, including the left-wing party Podemos and the Communist Party, have refused to merge into Chávez's single party (Morsbach, "Venezuela head seeks party merger").

3.3.2. Ideologies of the Bolivarian Revolution

The Bolivarian Revolution is a political system that is not based on a unique ideology, but rather on different ideologies that sometimes contradict each other (Carrera Damas, *El Bolivarianismo-militarismo* 125-125; Davila, *The Social and Political* 7; Lupi & Vivas 87). Chávez and government officials often talk about the revolution as a necessary step "*rumbo al socialismo del siglo XXI.*" In fact, in Venezuela it is common to find billboards advertising government projects with the slogan "*Rumbo al Socialismo del siglo XXI*" (Molone). However, "twenty-first century socialism" lacks a clear definition. According to Chávez himself, however, the vagueness of this definition is intentional (Wilpert 237).

The variety of sources and the lack of ideological clarity that characterizes Chávez's political thought were made evident during an interview in October 2005 conducted by the Chilean journalist Manuel Cabieses Donoso.²³ When asked for a definition of "*socialismo del siglo XXI,*" Chávez said:

Yo quiero aportar algunas ideas. Una es afirmar que el primer socialista de nuestra era fue Cristo. Soy cristiano y pienso que el socialismo debe

²³ Manuel Cabieses Donoso is a leftist Chilean journalist who has been the director of the magazine "Punto Final" since 1965.

nutrirse de las corrientes más auténticas del cristianismo. Tampoco se trata de andar buscando a un iluminado, como tú decías, para que nos haga un modelo que vamos a copiar todos. Sería absurdo. Vamos a hacer el socialismo desde nuestras propias raíces, desde nuestros aborígenes, desde las comunas en Paraguay y Brasil, desde el socialismo utópico que representó Simón Rodríguez, desde el planteamiento de Bolívar de libertad e igualdad, desde el planteamiento de Artigas, el gran uruguayo, de que hay que invertir el orden de la justicia, eliminando los privilegios. Creo que estamos comenzando esta tarea.

In the book The Politics of the Bolivarian Revolution, published in 2006 by one of Chávez's political advisors, Gabriel González, in collaboration with the journalists Chesa Boudin and Gabriel González, the ideology underlying the Bolivarian Revolution is presented as a combination of the legacy of Simón Bolívar, Simón Rodríguez and Ezequiel Zamora. This is the so-called *árbol de las tres raíces* that the revolution claims as the main source of its ideology. Moreover, and to add to the vagueness associated with Chávez's political ideology, the authors say that:

The work of these three thinkers was formative for Hugo Chávez, but he also draws on a diverse range of historical figures—including Mahatma Gandhi, Martin Luther King Jr., Jesus Christ, Che Guevara, Karl Marx, José Martí, and countless indigenous leaders from Venezuelan history and that of Latin America as a whole. Chávez defines himself as a Christian, an anti-imperialist, a nationalist, and a leftist (8)

In their article “(Mis)understanding Chávez and Venezuela in Time of Revolution,” Juan Pablo Lupi and Leonardo Vivas argue that “contrary to the claims of

structural transformation underlying most classic revolutions, the Chávez regime has not been shaped by a definite ideology” (87). They notice that *chavismo* is, instead, a system constantly constructed by Chávez himself, with a mix of ad hoc policies usually associated with the failures of previous governments. Lupi and Vivas assert that the power exercised by Chávez has shaped three of the most distinctive features of *chavismo*: sultanism, militarism and revolutionary fervor.

Sultanism is a notion in political science that refers to presidential regimes built upon loyalty to its leader rather than on clear ideology. It was first identified when referring to certain authoritarian political regimes that originated in the first part of the twentieth century. Sultanism is characterized by the leader’s concentration of power, a polarized political environment, and extreme corruption. Lupi and Vivas claim that in Chávez’s case, the authoritarian consolidation of his power occurred “within the cosmetic framework of a legally constitutional regime” (87-88).

The authoritarian nature of Chávez’s regime has been pointed out by several reports and articles written in the past few years by prominent international human rights organizations and newspapers. For instance, in their 2002 annual report, Human Rights Watch said that “President Chávez’s authoritarian tendencies continued to reveal themselves in efforts to undermine civil society institutions such as labor unions and the press.” Similarly, on February 22, 2007, the International Crisis Group noted in a report entitled “Venezuela: Hugo Chávez’s Revolution” that the country “seems set to move further down the road to autocracy” (1). Finally, on June 4, 2007, Rory Carroll, Caracas correspondent for the British newspaper *The Guardian*, wrote: “The closure of Venezuela’s popular, independent television channel RCTV signals a move towards authoritarianism for Hugo Chávez’s regime.” In the same article, he noted that “the

Chilean senate, the European Union, the US administration and a host of non-governmental organizations, such as Human Rights Watch, Amnesty International and Reporters Without Borders, have expressed varying degrees of concern about the implications for free speech in Venezuela.”

Another characteristic of sultanism is the presence of mechanisms that create loyalty to the leader, including corruption practices to guarantee votes. Lupi and Vivas argue that the use of public funds to secure voters has become a common practice in Chávez’s government. They give the example of a vast new network of grassroots organizations (called “participatory mechanisms” by the regime), which are completely financed by state funds. These mechanisms lack financial control or accountability, and are directly coordinated by Chávez or by one of his followers.

Militarism is the second characteristic of *Chavismo* identified by Lupi and Vivas. Although Chávez’s regime is not a military regime per se, the presence of army officials in key governmental posts has marked many of the regime’s policies (88).

The Venezuelan historian Germán Carrera Damas speaks about militarism as being an important component in Chávez’s ideology. In his book El Bolivarianismo-Militarismo: Una Ideología de Reemplazo, he argues that Chávez’s Bolivarian ideology results from the fusion between an old type of militarism that he calls “primitive militarism” (characterized by promoting patriotism and by being exclusivist), and the legacy of decaying autocratic socialism (associated with Marx and the former Soviet Union). In addition, Carrera Damas points out the contradiction that exists in Chávez’s ideology when the President tries to reconcile Marxist ideals with Bolivarian principles. The historian bases his argument on the devastating letter about Bolívar that Karl Marx wrote to Engels on February 14, 1858 (121-24). Marx wrote that Bolívar was:

El canalla más cobarde, brutal y miserable. Bolívar es el verdadero Soulouque²⁴...La fuerza creadora de los mitos, característica de la fantasía popular, en todas las épocas ha probado su eficiencia inventando grandes hombres. El ejemplo más notable de este tipo es sin duda, el de Simón Bolívar (quoted in Ayala Corao).

The last component of *Chavismo* identified by Lupi and Vivas deals with the revolutionary fervor that characterizes Chávez's followers. They argue that the passion for the revolution serves "as both a design and final justification" (89). They attribute this passion to Chávez's discourse, which "articulates several themes and sources of inspiration and virtually encourages battleground exercises in social confrontation animated by the military spirit as a final reserve of the nation" (89). Moreover, they stress that the most common method of confrontation of the *Chavismo* is to deny the legitimacy of any kind of political criticism, and to treat any opposition as an enemy to be destroyed. They say that:

The Chávez government has become so adamantly opposed to any opposition or criticism from political parties, civil society, or international observers that, following the script of revolution, it promotes deeper and deeper confrontation. This circumstance eventually led Chávez's opponents to engineer his ouster from power as the only political solution to a stalemate. (89)

According to José E. Molina, professor at the Instituto de Estudios Políticos y Derecho Público of Universidad del Zulia, the ideology of the Bolivarian Revolution falls

²⁴ Faustin-Élie Soulouque (c.1782-1867), also known as Faustin I, was a Haitian slave, president, and later emperor of Haiti, who represented the black majority of the country against the mulatto elite (Supplie 643).

into the category of the authoritarian left. On the one hand, he argues that the government is leftist because of its priority on reducing inequality, its plans for production in cooperatives, its intervention in the agricultural sector and its elimination of the managerial autonomy of PDVSA (the state oil company). On the other hand, he points out that Chávez's ideology can be classified as authoritarian given the fact that the government is not willing to negotiate any of its social plans with sectors of society that do not agree with its projects, despite the government's claim to be building a participatory democracy.

In an appendix to his book Changing Venezuela by Taking Power, Gregory Wilpert tries to identify Chávez's ideals for "twenty-first century socialism" based on speeches given by the president since the moment he introduced the concept on January 30, 2005. Thus, Wilpert mentions that at the fifth World Social Forum, when President Chávez announced his support for the creation of the twenty-first century socialism in Venezuela, he defined it in contrast to both capitalism and state-directed socialism:

There is no solution within capitalism, one must transcend capitalism. Nor is it about statism or state capitalism, which would be the same perversion of the Soviet Union, which was the cause of its fall. We must reclaim socialism as a thesis, as a project and a path, but a new socialism.

Humanism, putting humans and not the machine ahead of everything, the human and not the state." (quoted in Wilpert 238)

In addition, Wilpert cites a May 2006 speech, in which Chávez outlined the ideals of this socialism:

We have assumed commitment to direct the Bolivarian revolution towards socialism and to contribute to the socialist path, with a new socialism, a

socialism of the twentieth-first century, which is based in solidarity, in fraternity, in love, in justice, in liberty, and in equality. (quoted in Wilpert 239)

Wilpert notes that Chávez has mentioned that one of his key ideological influences, Simón Rodríguez, was a utopian socialist, and that he has claimed that Bolívar too would have been a socialist if he had lived longer. Wilpert also mentions that Chávez also associates socialist principles with Christian ideas, saying: “The symbol of capitalism is Judas and of socialism it is Christ.”(239)

Wilpert indicates that Chávez ties these ideals to his constitutional project by saying that twenty-first century socialism will contribute to a right enshrined in article 20 of Venezuela’s 1999 Constitution, namely everyone’s “right to the free development of his or her personality.” Chávez has said that this socialism is “community-based” and links its economic aspects to political ones such as on “participatory and protagonist democracy.”

As Wilpert notes, Chávez’s broad definition of this socialism is based entirely on values, ideals and goals shared by many other political and economic projects. It lacks, according to Wilpert, institutional definition and does not include specific practices or policies. The lack of consensus over the meaning of twenty-first century socialism stems in part, Wilpert argues, from the lack of a political party that can define it. Rather than a forum for articulating a new socialism, the MVR is primarily an electoral vehicle for Chávez, who often has the final word on policy in Venezuela.

However, Wilpert’s argument overlooks the political utility of Chávez’s ambiguous definition of twenty-first century socialism. By comparing the ideals of this socialism to those of Bolívar and Christ, he taps into a reservoir of two historical figures

that resonate with the Venezuelan population: Simón Bolívar as *el Padre de la Patria* in a country where Bolivarianism is considered “la segunda religion” of Venezuelans (Carrera Damas, *El Bolivarianismo-militarismo* 123), and Jesus Christ as God’s son and major representative of Catholicism, the first religion of Venezuelans . At the same time, while his talk of “socialism” has raised popular alarm over protection of the right to property, the vagueness of his definition avoids such controversies. In Chávez’s speeches, “socialism” is about community and fraternity, with the details left unspecified.

Finally, it is interesting to note that Chávez does not term his project “Venezuelan socialism” but rather “twenty-first century socialism,” positing it as a universal project defined by an era, rather than by a particular nation state. It is the very ambiguity of its definition, rather than Chávez’s actual policies in the historical specificity of contemporary Venezuela, that allows this form of socialism to be cast as a model for countries in the region and beyond, where the left is struggling to find consensus on the specifics of a new socialism after the disintegration of the Soviet Union.

3.4. Summary

This chapter provided the necessary historical background to support one of the main assumptions of this study: that Bolívar is the symbol of the nation’s emancipation (the founder of the republic) in the collective imaginary of Venezuelans. It also showed that the strategy of using Bolívar’s legacy and imaginaries for political purposes has been present in Venezuelan politics since Bolívar’s death. Finally, it demonstrated that the Bolivarian Revolution has not been shaped by a clear and unique ideology, but rather by diverse ideals that sometimes contradict each other.

Most of the imaginaries related to Bolívar are based on three periods of his adult life: 1810-1818, 1819-1826, and 1827-1830. In the first period, Bolívar was a young and

enlightened revolutionary leader who fought for Venezuela and New Granada. During the second one, he was recognized across the continent as a great universal liberator, a patriot who was able to see beyond national boundaries and take the revolution to its limits. In the last period, he was known as a statesman, a great leader who tried to establish institutions, assure security and promote reform.

Some of the imaginaries that have emerged since Bolívar's death include Bolívar the demigod, the revolutionary, the democrat and the Catholic. In addition, the imaginary that represents Bolívar as the leader who abolished slavery has persisted in Venezuelan society.

The Bolivarian ideology, as defined by Chávez and his supporters, results from a combination of the ideals of Bolívar, Rodríguez and Zamora, as well as those of Mahatma Gandhi, Martin Luther King Jr., Jesus Christ, Che Guevara, Karl Marx, José Martí, and countless indigenous leaders from Venezuelan history and from Latin America as a whole. Chávez defines himself variously as a Christian, an anti-imperialist, a nationalist, and a leftist.

Some authors have argued that contrary to the claims of structural transformation underlying most classic revolutions, the Chávez's regime has not been shaped by a definite ideology. *Chavismo* seems to be a system constantly constructed by Chávez himself, with a mix of ad hoc policies associated with the failures of previous governments. According to Lupi and Vivas, the power exercised by Chávez has shaped three of the most distinctive features of *chavismo*: sultanism, militarism and revolutionary fervor. José E. Molina argues that the ideology of the Bolivarian Revolution falls into the category of the authoritarian left. Gregory Wilpert notes that Chávez's broad definition of this socialism is based entirely on values, ideals and goals shared by many other political

and economic projects. It lacks, according to Wilpert, institutional definition and does not include specific practices or policies.

Finally, this chapter suggests that the lack of clear ideological content in Chávez's discourse does not necessarily weaken it. On the contrary, by juxtaposing the ideals of this socialism to those of Bolívar and Christ, Chávez taps into a reservoir of key historical figures that broadly resonate with the Venezuelan population.

In addition, it is the very ambiguity of its definition, rather than Chávez's actual policies in the historical specificity of contemporary Venezuela, that allows this form of socialism to be cast as a model for countries in the region and beyond, where leftist movements are still struggling to find consensus on socialism following the disintegration of the Soviet Union.

Chapter 4: Refounding the Nation - Analysis of Data (1999-2001)

This chapter presents and analyzes the results of the study from 1999 through 2001. It shows how Chávez used metaphors about the nation, his Bolivarian Revolution, and his opponents in order to distance himself and his political project from previous governments. The chapter argues that by separating his Bolivarian Revolution from previous governments, Chávez attempted to construct a discourse of national refoundation in which opponents (mainly conceptualized as former governments in the early years of Chávez's term) began to be marginalized.

Chávez's discourse of national refoundation emerged at the end of a 40-year period in Venezuelan history characterized by a political environment of increasing corruption, unpopular neoliberal policies, and widespread dissatisfaction with the two parties that had ruled the country since 1958. The chapter shows that during the period 1999-2001, Chávez mainly represented the nation as a "resurrecting person," conceptualized his revolution in terms of "war against previous regimes," and portrayed former governments with destruction metaphors and current opponents with conflict metaphors. All metaphors used to conceptualize the opposition had negative connotations.

After a brief description of the 1999-2001 speeches and their contexts, I provide an overview of the metaphors used by Chávez in those speeches by the three target domains examined in this dissertation. Then I analyze each of these domains in relation to their source domains in order to show how Chávez's metaphors contributed to constructing a discourse of national refoundation while distancing himself and his Bolivarian Revolution from previous governments.

4.1. Speeches and Their Contexts (1999-2001)

The first speech was given on May 13, 1999 and consisted of 20,409 words. It was aimed at giving a review of the government's activities within the first 100 days in office. The speech was aired on all television channels and radio stations in the country in what is commonly called in Venezuela *una cadena nacional*. It took place three weeks after a referendum to hold a Constitutional Assembly, won by Chávez with 88% of votes but marked by an abstention of more than 60%. Two months after the speech, Chávez's coalition obtained approximately two-thirds of the seats in the election of the members of the Constitutional Assembly. The new Constitution was approved with approximately 71% of votes on December 15 of that year.²⁵

The second speech was given on August 2, 2000 and consisted of 9,985 words. It was aimed at giving a review of the government's activities within the first eighteen months in office. Like the first speech, this one was aired by all television channels and radio stations. It took place two days after the presidential and legislative elections of July 31, 2000, won by Chávez with 59% of the votes.

The last speech analysed for this period was given on June 15, 2001 and consisted of 28,875 words. As with the two previous ones, this speech was also aired by all television channels and radio stations in the country. It was given five months after Chávez took office for the second time in January 2000. In the speech Chávez raises several issues related to his revolution, including the increasing opposition of television channels and newspapers to his political project. The speech took place five months before a national strike (*paro nacional*) that began in December 2001.

²⁵ The new Constitution was approved with 56% abstention.

4.2. Overview of Chávez's Metaphors by Target Domain (1999-2001)

This section provides an overview of the metaphors used by Chávez between 1999 and 2001 to conceptualize the three target domains analyzed in this dissertation: the Venezuelan nation, Chávez's Bolivarian Revolution, and his opposition. Metaphors to conceptualize the nation included those metaphors used when referring to the country as well as those used when referring to its citizens. Metaphors used to conceptualize Chávez's Bolivarian Revolution included those used when referring to his political project and his government's plans, as well as those used when referring to himself as the leader of his revolution. Finally, metaphors used to conceptualize his political opposition included those used when referring to former governments as well as those used when referring to current opponents.

A total of 116 metaphors were identified in the three speeches. This was carried out following the methodology provided by Critical Metaphor Analysis described in Chapter 2 of this dissertation.

Out of the 116 metaphors identified, 46% (53 metaphors) were used to conceptualize the nation, 38% (44 metaphors) were used to conceptualize Chávez's Bolivarian Revolution, and 16% (19 metaphors) were used to conceptualize Chávez's opposition. These findings, summarized in the table below, show the prominent role of the nation in Chávez's political discourse in the early stages of his regime.

Table 1
Number of Metaphors by Target Domain (1999-2001)

| | 1999 | 2000 | 2001 | Total | |
|--------------|-------------|-------------|-------------|--------------|-----|
| Nation | 34 | 6 | 13 | 53 | 46% |
| Revolution | 13 | 20 | 11 | 44 | 38% |
| Opposition | 2 | 4 | 13 | 19 | 16% |
| Total | 49 | 30 | 37 | 116 | |

The 1999 speech, given three and a half months after his arrival to power, showed the highest percentage of metaphors to conceptualize the nation: 69% (34 out of 49). In comparison, the 2000 and 2001 speeches showed 20% (6 out of 30) and 35% (13 out of 37) respectively. These findings suggest a strong presence of nationalistic elements in the first speech. The nationalistic character of this speech is supported by a brief analysis of the number of times Chávez quoted Simón Bolívar's words: ten times in the 1999 speech, compared to only two times in the 2000 speech and one time in the 2001 speech. It is interesting to note that Chávez's quotes of Bolívar are generally textual references learned by heart. Oftentimes, more than simply citing Bolívar, the president actually impersonates him. For instance, in the 1999 speech, Chávez said:

Yo recordaba esta mañana un pensamiento que estilábamos escribir, yo lo tuve un año escrito en una pizarra de un comando militar en el que estuve aquí mismo en Conejo Blanco, en la Academia Militar, un pensamiento de Bolívar que siempre motivaba, motiva y motivará, es motivante. Les ruego lo oigan, voy a citarlo textualmente porque me lo aprendí de memoria: "Yo espero mucho del tiempo, su inmenso vientre contiene más esperanzas que sucesos pasados y los acontecimientos futuros deben ser muy superiores a los pretéritos", con esta convicción seguros estamos que

los 100 días que vienen serán mejores que éstos que hoy terminaron y los posteriores igual y así sucesivamente. Venezuela está resucitando, se está levantando una patria nueva.

The strong presence of nationalistic elements in the first speech may be attributed to the fact that it was held two months before the election of the members of an assembly to write a new constitution for the nation. Although the apparent reason of the speech was the celebration of Chávez's 100 days in office, it was essentially an electoral speech in which the need to persuade through a discourse of "national refoundation" (and to rouse the nationalistic sentiments of Venezuelans) was probably greater than in the other two speeches.

Another interesting observation is the high percentage of metaphors used to conceptualize Chávez's Bolivarian Revolution in the 2000 speech: 67% (20 out of 30), compared to 27% (13 out of 49) in 1999 and 30% (11 out of 37) in 2001. This seems to be directly related to the type of speech he was making. Thus, contrary to the case of the 1999 speech, which was essentially an electoral speech, the 2000 speech was mainly made to provide a balance of the state of the country eighteen months after Chávez's arrival to power. The high percentage of metaphors to conceptualize Chávez's Bolivarian Revolution corresponds to the main intention of the speech: to highlight the achievements of the regime.

Finally, it is interesting to note that the proportion of metaphors used to conceptualize Chávez's opposition went from 4% (2 out of 49) in the 1999 speech, to 13% (4 out of 30) in the 2000 speech, to 35% (13 out of 37) in the 2001 speech. This rise suggests an increasing importance of opponents in Chávez's discursive practices as president of Venezuela. Table 2, which shows the breakdown of this target domain for

the three years examined, shows a shift in the type of opposition conceptualized in Chávez's speeches between 1999 and 2001.

Table 2
Number of Metaphors with Target Domain "Opposition" (1999-2001)

| | 1999 | 2000 | 2001 | Total |
|--------------------|-------------|-------------|-------------|--------------|
| Former Governments | 2 | 4 | 2 | 8 |
| Current Opposition | 0 | 0 | 11 | 11 |
| Total | 2 | 4 | 13 | 19 |

In the 1999 and 2000 speeches, all metaphors targeting Chávez's opposition referred to former governments. In the 2001 speech, most metaphors with this target domain referred to current opponents. This shift suggests a change of focus in the president's discursive strategies from previous governments in 1999 and 2000, to current opponents in 2001. This shift will be examined further in the next section, where source domains will be analyzed in detail.

4.3. Source Domains in Chávez's Metaphors (1999-2001)

All 116 metaphors were classified according to their source domains and conceptual metaphors were identified for each of them. This was carried out following the methodology provided by Critical Metaphor Analysis and by cognitive linguistics described in Chapter 2 of this dissertation. In this respect, it is worth recalling that metaphors occur when there is semantic tension between two domains: the source and the target domains. From a linguistic standpoint, this tension can be caused either by reification, personification or depersonification. Reification occurs when we refer to something abstract using a word or phrase that in other contexts refers to something concrete. Personification occurs when we refer to something inanimate using a word or

phrase that in other contexts refers to something animate. Depersonification occurs when we refer to something animate using a word or phrase that in other contexts is inanimate (Charteris-Black, *Corpus Approaches* 21).

Conceptual metaphors such as POLITICS IS CONFLICT or LIFE IS A JOURNEY have clear source domains (conflict and journey) that conceptualize their respective target domains (politics and life). They are drawn from expressions such as “in these elections we will defeat our opponents” or “after her husband’s funeral, she decided to move forward.” These metaphors are reifications because they refer to something abstract using a word or phrase that in other contexts refers to something concrete. In this analysis these types of metaphors were classified by their source domains (conflict metaphors or life/death metaphors) and not by their general type (reifications).

In the case of personifications, given that their source domain is always a person, they were simply classified as personifications. For instance, when Chávez says “Venezuela está resucitando,” he is actually using a personification (VENEZUELA IS A PERSON) rather than some conceptualization from another source domain such as life/death or religion. Therefore, the metaphor “Venezuela está resucitando” was classified as a personification represented by the conceptual metaphor VENEZUELA IS A RESURRECTING PERSON.

In the case of metaphors conceptualizing the opposition, they were never classified as personifications given that the target domain “opposition” already refers to an ensemble of people. Instead, these metaphors were classified according to their most apparent source domain. For instance, when Chávez addresses his opponents and says

“yo los entiendo, escuálidos,²⁶ ustedes no se bastan y empiezan a buscar resfuerzos,” the most apparent source domain seems to be war, so the conceptual metaphor is THE OPPOSITION IS A COMBATANT rather than THE OPPOSITION IS A PERSON.

In the three speeches examined in this chapter, the most frequent source domains were personification, conflict, nature and construction. Other domains included journey, nautical, religion and destruction. Table 3 illustrates these findings.

Table 3
Number of Metaphors by Source Domain (1999-2001)

| | 1999 | 2000 | 2001 | Total | |
|-----------------|-----------|-----------|-----------|------------|-----|
| Personification | 23 | 3 | 7 | 33 | 28% |
| Conflict | 5 | 3 | 18 | 26 | 22% |
| Nature | 5 | 2 | 1 | 8 | 7% |
| Construction | 2 | 8 | 0 | 10 | 9% |
| Journey | 1 | 7 | 1 | 9 | 8% |
| Nautical | 4 | 3 | 0 | 7 | 6% |
| Destruction | 0 | 1 | 3 | 4 | 3% |
| Morality | 2 | 1 | 1 | 4 | 3% |
| Others | 7 | 2 | 6 | 15 | 14% |
| Total | 49 | 30 | 37 | 116 | |

As seen in the table above, personification was the most common type of metaphor in Chávez’s discourse, accounting for 28% (33 metaphors). In his book Politicians and Rhetoric, Charteris-Black mentions that it is not surprising that personifications are often the most frequent linguistic figure. He says:

The explanation for the high frequency of personification is relatively easy: nations, political parties, particular systems of political belief (e.g. socialism or democracy) or particular abstract nouns (e.g. freedom,

²⁶ Chávez and his supporters use the word *escuálido* when referring to his current opponents. It is not clear why the president started referring to his opponents as *escuálidos*. Some people say that the term was first used by Chávez when referring to the demonstrations of his opponents (which he considered “thin” compared to the demonstrations of his supporters). In her article “Toledo, el escuálido,” Paulina Gamus claims that Chávez simply meant to call his opponents dirty people.

tyranny, progress, etc.) become more emotionally arousing by thinking of them as good or bad people. (204)

If we look at Chávez's personification metaphors by target domain for the period analyzed, we notice that 27 out of the 33 metaphors found (or approximately 82%) were used to describe the nation. The remaining 6 metaphors (or approximately 18%) were used to describe Chávez's Bolivarian Revolution.

4.4. Conceptualizing the Nation

4.4.1. Conceptualizing the Nation as a "Resurrecting Person"

When we analyze Chávez's metaphors to describe the nation for the period 1999-2001, we find that most of his metaphors (as much as 57%) were personifications. He also used nautical metaphors (11%), construction metaphors (6%), nature metaphors (3%), and dream metaphors (3%). These findings are illustrated in the following table:

Table 4
Number and Types of Metaphors for the Target Domain "Nation" (1999-2001)

| | 1999 | 2000 | 2001 | Total | |
|-----------------|-------------|-------------|-------------|--------------|-----|
| Personification | 19 | 2 | 6 | 27 | 57% |
| Nautical | 3 | 2 | 0 | 5 | 11% |
| Construction | 2 | 1 | 0 | 3 | 6% |
| Nature | 2 | 0 | 0 | 2 | 4% |
| Dreams | 2 | 0 | 0 | 2 | 4% |
| Others | 3 | 2 | 3 | 8 | 17% |
| Total | 31 | 7 | 6 | 47 | |

The speech that showed more cases of personifications when describing the nation was the 1999 speech. As much as 19 personifications out of the 27 (or approximately 70%) were identified in the speech. This is partially explained by the fact that, overall, the most frequent target domain in the 1999 was "nation." In addition, and as mentioned before, given that the 1999 speech was in fact an electoral speech (aimed at obtaining

support for a new constitution), the need to persuade through a national refoundation discourse (and to rouse the nationalistic sentiments of Venezuelans) was probably greater than in the other two speeches.

Almost half of the personifications describing the nation (9 out of 19) seem to support the argument that in the first three years of his presidency, Chávez used metaphors in his attempt to construct a discourse of national refoundation while distancing himself and his revolution from previous governments. The conceptual metaphor THE NATION IS A RESURRECTING PERSON was the most common personification that Chávez employed to describe Venezuela in the period 1999-2001. Examples of this metaphor include: “Venezuela está resucitando, se está levantando una patria nueva,” “ha renacido un pueblo y ¡qué pueblo caramba!” “Venezuela está resucitando y levanta la bandera de la paz y la integración de todos,” and “[los inversionistas] están también interesados y motivados en este proceso de resurrección de Venezuela.”

The metaphor THE NATION IS A RESURRECTING PERSON implies that a new beginning is taking place. This interpretation draws from the idea that the nation was “dead” and “finished,” but now that Chávez is in power, the nation is “born again.” This suggests a process of rebirth, consistent with the nation refoundation argument. In addition, this argument is also supported by another personification about the nation found in the 1999 speech, represented by the conceptual metaphor THE NATION IS A RECOVERING PERSON: “Haber llegado a estos 100 días con este espíritu, con estos logros modestos, humildes, pero hay que reconocerlos, primeros pasos de un verdadero proyecto de transición, de una verdadera recuperación del país.” In sum, the prominent role of the nation during Chávez’s first three years (46% of all metaphors), coupled with

the fact that he represented his arrival to power as “a resurrection,” suggests that Chávez conceptualizes the Bolivarian Revolution as a process of nation refoundation.

Other interesting personifications used by Chávez to describe the nation emphasize its “decaying state” before his arrival to power. This also contributes to establishing a distance between the past (conceptualized as “ugly,” “in crisis,” and “abandoned”) and the “better” present represented by Chávez, which also contributes to the national refoundation argument. Thus, Chávez says “[a la nación] hay que rescatarla, reconstruirla, ponerla bonita,” later he says “Venezuela viene saliendo de esa noche terrible,” and then he says “amigos y compatriotas que viven en esa inmensidad de Venezuela que ha estado abandonada durante muchos años.” This trend is clearly illustrated in the following metaphorical chaining found in one of the last paragraphs of the speech, in which the coherent of the section is explained by the conceptual metaphor VENEZUELA IS A RECOVERING PERSON:

Venezuela será digna de nuevo, está en marcha hacia la dignidad.

Venezuela será grande de nuevo, está en marcha hacia su grandeza.

Venezuela será gloriosa de nuevo, está levantando las banderas de su gloria, de la gloria de su pueblo, de la esperanza de la gente.

Although the 2000 and the 2001 speeches showed few cases of personification to conceptualize the nation, they included some examples that show Chávez’s intention to demean the past as he distances himself and his revolution from it. For instance, in the 2001 speech, Chávez referred to the nation as “un pueblo fortalecido” and as “un país de emergencia, un país que resucitó.”

4.4.2. Conceptualizing the Nation as Chávez

It is interesting to note one personification that appeared in the 2001 speech where the nation was represented by the conceptual metaphor EL PUEBLO (THE NATION) IS CHÁVEZ. Identifying the nation with himself is something that Chávez started doing in 2001, and that he continued in subsequent years. This unexpected finding supports the main argument of this dissertation (namely that by conceptualizing his Bolivarian Revolution as the continuation of Bolívar's independence wars, Chávez's constructs a representation of his opponents as enemies of the nation). In this case, by representing the nation as himself, Chávez is conceptualizing his political opponents as enemies of the nation in a much more direct way than the one described by the main argument of this dissertation.

Although the conceptualization of the nation as Chávez became more apparent after 2004, it is interesting to quote this case now as it is the first case of this type found in this study. In addition, this example clearly shows how opposing Chávez is conceptualized in his discourse as opposing the nation.

Porque cuando un extranjero viene aquí, o una persona de cualquier país a dar una conferencia, o a hablar, o a una rueda de prensa, y entonces llega y dice: no, es que aquí Chávez se parece a Mussolini, ésta es una tiranía. No está irrespetando a Chávez, no crean que yo lo hago por mí, yo lo hago por todos ustedes, porque este pueblo, nuestro pueblo merece respeto y aquí lo que hay es una democracia. Y cuando alguien viene a decir que Chávez es un tirano, un dictador, bueno, está atropellando al pueblo que fue quien me eligió, la mayoría. Le está diciendo dictadores también a ustedes, o le está

diciendo ignorantes a ustedes, o le está diciendo imbéciles a ustedes que apoyan a un dictador pues, o a un tirano. (44)

4.4.3. Other Conceptualizations of the Nation: Nautical and Construction

Metaphors

It is worth noticing other metaphors used by Chávez to conceptualize the nation. As shown in Table 4 above, nautical and construction metaphors were the second and third most frequent types of metaphors in the 1999 and 2000 speeches.

In the 1999 speech Chávez said “muchos de ellos [los inversionistas] que conocen a nuestro país desde hace tiempo, también les duele ese hundimiento de Venezuela en los últimos años.” Here the conceptual metaphor VENEZUELA WAS A SINKING SHIP²⁷ shows how Chávez demeans the past separating his government from it. In another example, Chávez speaks about the past as a period when “Venezuela perdió el rumbo.” Here the conceptual metaphor is VENEZUELA IS A SHIP AT DRIFT.

In terms of construction metaphors, Chávez says that Venezuela “hay que reconstruirla.” Here the conceptual metaphor is VENEZUELA IS A DESTROYED BUILDING. This metaphor has the same effect as VENEZUELA WAS A SINKING SHIP or VENEZUELA IS A SHIP AT DRIFT. Similarly, he speaks about the past as the time when “un pueblo se desmorona.”

4.5. Conceptualizing the Bolivarian Revolution as War

The concept of Bolivarian Revolution to refer to his political project has been present in Chávez’s discourse since the very early years of his first term of office. For instance, in the 1999 speech, only 100 days after his arrival to power, Chávez said:

²⁷ Other less common conceptual metaphors that could have described this example are VENEZUELA IS A SINKING BUILDING or VENEZUELA IS A SINKING BODY.

Vamos a comenzar por 500 escuelas bolivarianas. Escuelas bolivarianas porque va a ser la idea, y ahí va la filosofía, ustedes saben la dialéctica: filosofía y praxis, no podemos estar filosofando un siglo, decía Bolívar, que hay que pensar y hacer, bueno, esa filosofía de la revolución bolivariana, vamos a comenzar a sembrarla.

The definition of revolution generally implies a change in the institutions of a nation. The dictionary of the *Real Academia Española* defines *revolución* as a “cambio violento en las instituciones políticas, económicas o sociales de una nación.” Given that Chávez’s regime has existed since 1999 in relative peace, it could be argued that his political project cannot be defined as a genuine revolution accompanied by violent change. In fact, he often uses the oxymoron “revolución pacífica” to justify this contradiction. For instance, in the 1999 speech Chávez said: “estamos en un verdadero proceso revolucionario con el signo venezolano de este tiempo, es una revolución popular, pacífica y democrática que tiene nombre y tiene cauce.”

By conceptualizing his political project as a revolution, Chávez evokes a new beginning where his political project is at the center of a fundamental change. This is consistent with the main argument of this chapter, which stresses Chávez’s objective to construct a discourse of national refoundation while distancing himself and his revolution from previous governments.

The analysis of metaphors used by Chávez to conceptualize his Bolivarian Revolution during the period 1999-2001 shows that conflict metaphors were the most frequent types of metaphors, accounting for 32% of all metaphors in the three-year period. They were followed by journey metaphors (20%), and construction metaphors (17%). Table 5 illustrates these findings:

Table 5
Number of Metaphors by Source Domain for “Chávez’s Bolivarian Revolution”
(1999-2001)

| | 1999 | 2000 | 2001 | Total | |
|-----------------|-----------|-----------|-----------|-----------|-----|
| Conflict | 3 | 3 | 7 | 13 | 32% |
| Journey | 0 | 7 | 1 | 8 | 20% |
| Construction | 0 | 7 | 0 | 7 | 17% |
| Personification | 4 | 1 | 1 | 6 | 14% |
| Others | 3 | 2 | 2 | 7 | 17% |
| Total | 10 | 20 | 11 | 41 | |

In all 13 cases of conflict metaphors, Chávez conceptualized his revolution as war. That is to say, the conceptual metaphor THE BOLIVARIAN REVOLUTION IS WAR was underneath each and every one of the cases. For instance, in the 1999 speech, when speaking about *El Proyecto Bolívar 2000*,²⁸ Chávez said: “Estamos planificando una nueva ofensiva, digámoslo así, en el Proyecto Bolívar 2000 para incrementar la atención a los más necesitados.” Similarly, when referring to his government’s plans for housing, Chávez said: “en todo el país se ha iniciado un programa ofensivo, una ofensiva muy agresiva, muy rápida de construcción de viviendas.” Also, when talking about his plans to improve the precarious situation of healthcare in Venezuela, he said: “hay que entrarle por todos los flancos.”

²⁸ *Proyecto Bolívar 2000* is defined in the Website of *Ministerio del Poder Popular para la Planificación y Desarrollo* as follows:

- Es un plan cívico-militar que tiene como finalidad activar y orientar la recuperación y fortalecimiento de Venezuela y atender las necesidades sociales del país. En tal sentido, el Proyecto está dividido en tres etapas:
- Proyecto País (Propaís) que proporcionará asistencia urgente a la población más necesitada y en máxima exclusión social.
 - Proyecto Patria (Propatria) que incorporará a empleados públicos y desempleados a las actividades de atención a la sociedad y organizará a las comunidades para el trabajo productivo.
 - Proyecto Nación (Pronación), bajo la dirección de Cordiplan, fase durante la cual se desarrollarán proyectos estructurales, como las industrias petroquímica, del gas y agrícola, así como el de una educación masiva.

The same trend noted in the 1999 speech concerning conflict metaphors (THE BOLIVARIAN REVOLUTION IS WAR) was observed in the 2000 and 2001 speeches. As Chávez's regime has existed in an environment of relative peace since 1999, it could be argued that the use of conflict metaphors to conceptualize his project responds to the need for constructing and legitimizing the idea of a genuine revolution (characterized by a violent change), at least at a discursive level.

In sum, by using conflict metaphors to conceptualize his political project, Chávez is attributing to his revolution the violent element that it lacks. This contributes to legitimize his project as a genuine revolution, which implies a violent change followed by a new beginning. This supports the main argument of this chapter: that Chávez uses metaphors in an attempt to construct a discourse of national refoundation while distancing himself and his Bolivarian Revolution from previous governments.

4.5.1. The Bolivarian Revolution as the Continuation of Bolívar's Independence Wars

CMA was not used to identify representations of Chávez's Bolivarian Revolution as the continuation of Bolívar's independence wars. This is due to the fact that both domains (Chávez's Bolivarian Revolution and Bolívar's independence wars) are not based on bodily experiences. CMA can only be used to analyze an abstract entity (like the nation) in terms of something based on bodily experiences (like a journey).

Moreover, one of the research questions of the study requires finding explicit (non-metaphorical) references in which Chávez represents his revolution as the continuation of Bolívar's independence wars. Therefore, this part of the analysis will be carried out by identifying explicit passages in which Chávez represents his project as the continuation of Bolívar's independence wars.

Only one explicit reference was found in the corpus for the period 1999-2001. At the beginning of the 2001 speech, Chávez said:

Invito al pueblo venezolano todo, el 24 de junio, vamos, a la Sabana Gloriosa a sentir el viento de la pampa de la libertad, el viento heroico de aquella batalla, de aquella gesta, de aquella esperanza, de aquella lucha que es la misma lucha de hoy. Esta es la continuación de aquella revolución, “La Bolivariana.”

By saying “aquella lucha que es la misma de hoy,” Chávez ignored in his discourse almost 170 years of history, including the forty years of democracy that preceded him. This produces an erasure effect that serves his purpose of breaking with previous governments. Not only he conceptualized his revolution as a new beginning vis-à-vis previous governments, he tried to make them invisible to his audience. Also, as one of the main arguments of this study states, by conceptualizing his revolution as the continuation of Bolívar’s independence wars, Chávez suggests that opposing the Revolution is the same thing as opposing the nation (given that Bolívar is considered the founder of the nation in the collective imaginary of Venezuelans).

4.5.2. Other Conceptualizations of Chávez’s Bolivarian Revolution: Journey and Construction Metaphors

Most of the journey and construction metaphors used to conceptualize Chávez’s project were used in the 2000 speech (7 out of 8 journey metaphors, and 7 out of 7 construction metaphors). Journey and construction metaphors are strong source domains given that they provide a clear path with start and end points. In Politicians and Rhetoric, Charteris-Black argues that unlike personifications, which often create relations of contrast between the poles of good and evil, the rhetorical purpose of journey metaphors

is to create solidarity so that positively evaluated purposes may be successfully attained (45). This may also be applied to construction metaphors, where positively evaluated purposes are conceptualized as buildings.

The construction metaphors used by Chávez in his 2000 speech to conceptualize his political project include: “asumimos la tarea de tender un puente,” “ésta [...] es la década de la reconstrucción de Venezuela,” “vamos a reconstruir un edificio [...] a construirlo,” “hemos comenzado a rehacer el recipiente,” “esto no existe hoy, vamos a construirlo,” “esto es un puente para salir del infierno,” and “construir la democracia participativa y protagónica.”

The journey metaphors used by Chávez in his 2000 speech to conceptualize his political project include: “ya está señalado el camino de la legitimación,” “yo te propongo un camino, tú lo aceptas o no,” “ahora Chávez no puede echar atrás,” “este es el camino para los próximos 100 años,” “sigamos el camino, logrando lo que tenemos,” “arranquemos en esta nueva etapa de la revolución,” and “infinitos caminos nos esperan.”

The fact that most construction and journey metaphors appear in the 2000 speech seems to be directly related to the type of speech he made. As mentioned earlier, contrary to the case of the 1999 speech which was essentially an electoral speech, the 2000 speech was mainly made to provide a review of the state of the country eighteen months after Chávez’s arrival to power. The high percentage of construction and journey metaphors to conceptualize Chávez’s project corresponds to the main intention of the speech: to highlight the achievements of the regime and frame them in terms of national solidarity. These achievements are presented as construction works in progress (buildings, bridges, etc.) or as journeys to “better places” and “better times.”

4.6. Conceptualizing the Opposition with Conflict and Destruction Metaphors

Opponents are mainly conceptualized through conflict (42% of total) and destruction (21% of total) metaphors for the three years analyzed in this chapter. Other source domains used by Chávez to conceptualize opponents included nature and crime. Table 6 illustrates the number of metaphors by source domain for the “opposition” target domain.

Table 6
Number of Metaphors by Source Domain for “Opposition” (1999-2001)

| | 1999 | 2000 | 2001 | Total | |
|--------------|-------------|-------------|-------------|--------------|-----|
| Conflict | 0 | 0 | 8 | 8 | 42% |
| Destruction | 0 | 1 | 3 | 4 | 21% |
| Nature | 0 | 2 | 0 | 2 | 11% |
| Others | 2 | 1 | 2 | 5 | 26% |
| Total | 2 | 4 | 15 | 19 | |

As mentioned before, the target domain “opposition” included two types of metaphors (or sub-domains): those used to describe former governments and those used to describe current opponents. This distinction is important as it illustrates how, in Chávez’s discourse, his opposition shifted from former governments in the early stages of his rule (1999 and 2000), to current opponents in 2001. In the 1999 and 2000 speeches, all metaphors about opponents referred to former governments, whereas in the 2001 speech 87% of all metaphors referred to current opponents.

4.6.1. Conceptualizations of Former Governments

Former governments were mainly conceptualized by using destruction, crime and nature metaphors, while current opponents were only conceptualized by using conflict metaphors. Table 7 summarizes the number of metaphors used to conceptualize former governments by source domain.

Table 7
Number of Metaphors by Source Domain for “Former Governments” (1999-2001)

| | 1999 | 2000 | 2001 | Total | |
|--------------|-------------|-------------|-------------|--------------|-----|
| Destruction | 0 | 1 | 2 | 3 | 38% |
| Crime | 2 | 0 | 0 | 2 | 25% |
| Nature | 0 | 2 | 0 | 2 | 25% |
| House | 0 | 1 | 0 | 1 | 12% |
| Total | 2 | 4 | 2 | 8 | |

The first destruction metaphor used by Chávez to represent former governments conceptualized them as collapsing buildings. It was found in the 2000 speech and was represented by the conceptual metaphor FORMER GOVERNMENTS WERE COLLAPSING BUILDINGS: “tenía que caer, teníamos que derribarlo completamente.” The second metaphor, found in the 2001 speech, conceptualizes former governments as out-of-control and dangerous vehicles: “el pueblo pobre que lo atropellaron durante tantos años.” The conceptual metaphor here is FORMER GOVERNMENTS WERE UNCONTROLLED VEHICLES. Finally, in the 2001 speech, Chávez conceptualizes former governments as destructive agents: “ésta es la Venezuela, chico, del fin del siglo, vale, producto del desastre más grande que hemos vivido en los últimos 40, 50 años.” Here the conceptual metaphor is FORMER GOVERNMENTS WERE DESTRUCTIVE AGENTS.

It is interesting to note that if context had provided some indication that Chávez was conceptualizing the country’s situation as a natural disaster, the latter metaphor could have been described by the conceptual metaphor FORMER GOVERNMENTS WERE HURRICANES or FORMER GOVERNMENTS WERE STORMS. In that case the metaphor would have been classified as a nature metaphor. However, as context is not

specific enough, the conceptual metaphor used was FORMER GOVERNMENTS WERE DESTRUCTIVE AGENTS.

The three conceptualizations described above are consistent with the argument that, in his first three years in office, Chávez wanted to break with the past (which is consistent with a project of national refoundation). All of them imply starting over: after a building collapses, it needs to be rebuilt; after someone has been run over by a vehicle, she needs to recover; after a disaster, reconstruction begins.

As for crime metaphors, when Chávez talks about former governments in the 1999 speech he says “les quitamos las máscaras” conceptualizing them as masked thieves. Also, he talks about their term in office as “proceso nefasto, salvaje,” suggesting that former governments are criminals that caused harm to the Venezuelan people.

As far as nature metaphors are concerned, in the 2000 speech, when referring to former governments, Chávez said “lo viejo que ya no servía, podrido, tenía que irse, tenía que caer, teníamos que derribarlo completamente.” Similarly, when referring to former government’s político-juridical legacy, Chávez said “yo creo que hemos limpiado no todo el pantano, el pantano es y está, se extendió demasiado, mucha profundidad, pero creo que hemos limpiado buena parte del pantano, con éxito, cuando digo pantano me refiero al marco político jurídico.” Conceptual metaphors in these cases are FORMER GOVERNMENTS WERE ROTTEN BODIES and FORMER GOVERNMENTS WERE SWAMP CREATURES respectively.

4.6.2. Conceptualizations of Current Opponents

In the corpus of this study, current opponents started being conceptualized metaphorically in the 2001 speech. In fact, 87% of all metaphors referring to opponents in the 2001 speech had current opponents as their target domain. The shift of focus from

“former governments” in the 1999 and 2000 speeches to “current opponents” in the 2001 speech, suggests a transition in Chávez’s discursive practices. The “breaking with the past” (nation refoundation) discourse seems to have been moving toward something different, where his targets were no longer former governments but rather current opponents.

Current opponents were mainly conceptualized by using metaphors of conflict and nature. Table 8 summarizes the number of metaphors used to conceptualize current opponents by source domain.

Table 8
Number of Metaphors by Source Domain for “Current Opponents” (1999-2001)

| | 1999 | 2000 | 2001 | Total | |
|--------------|-------------|-------------|-------------|--------------|-----|
| Conflict | 0 | 0 | 8 | 8 | 73% |
| Crime | 0 | 0 | 1 | 1 | 9% |
| Destruction | 0 | 0 | 1 | 1 | 9% |
| Life/Death | 0 | 0 | 1 | 1 | 9% |
| Total | 0 | 0 | 11 | 11 | |

Conflict metaphors accounted for 73% of all metaphors used to conceptualize current opponents, and they were all represented by the conceptual metaphor CURRENT OPPONENTS ARE COMBATANTS. When referring to his opponents, Chávez said “han ocupado los medios [...] esa es su trinchera,” “ellos están asumiendo la batalla política,” and “el ataque de los escuálidos utilizando [...] medios de comunicación.” Then, while addressing his opponents, he said “ustedes no se bastan y [...] tienen que buscar reesfuerzos,” and “analicen primero antes de atacar.”

It is interesting to note Chávez’s use of the word *escuálido* when referring to his current opponents. In her paper “El discurso de Hugo Chávez: Bolívar como estrategia para dividir a los venezolanos” published in 2003, Irma Chumaceiro noted that: “El

empleo del término escuálido(s), constituye en sí mismo un juicio de valor, ya que según el diccionario de la Academia Española denota 1.- Sucio, asqueroso. 2. – Flaco, macilento.”

All metaphors used to conceptualize the opposition (either former governments or current opponents) have negative connotations. This, coupled with the fact that the Bolivarian Revolution was exclusively conceptualized as “war,” contributed to create a discourse in which opponents began to be marginalized. This trend, which intensified in the period 2002-2004, will be analyzed in chapter 5.

Also, the shift of focus from “former governments” to “current opponents, combined with the fact that current opponents were mainly represented as combatants, suggests a transition in the objectives of Chávez’s discursive practices from “refounding the nation” to “polarizing the nation.” The polarization of Venezuela between Chávez’s supporters and opponents will be explored in the next chapter.

4.7. Summary of Findings for the Period 1999-2001

The analysis of metaphors for the period 1999-2001 indicates that Chávez’s primary rhetorical objective was to separate himself and his Bolivarian Revolution from all previous Venezuelan governments in an attempt to construct a discourse of national refoundation in which opponents started to be marginalized. For this, he represented the nation as a “resurrecting person,” conceptualized his project in terms of “war against previous regimes,” and portrayed former governments with destruction metaphors and current opponents with conflict metaphors. All metaphors used to conceptualize the opposition had negative connotations.

Out of the 116 metaphors identified for the period 1999-2001, 46% were used to conceptualize the nation, 38% were used to conceptualize Chávez’s Bolivarian

Revolution, and 16% were used to conceptualize Chávez's opponents. These findings show the prominent role of the nation in Chávez's political discourse in the early stages of his regime.

Personification was the most common type of metaphor in Chávez's discourse, accounting for 28%. Approximately 82% of all personifications were used to describe the nation. Approximately 18% were used to describe Chávez's Bolivarian Revolution.

Almost half of the personifications describing the nation seemed to support the argument that in the first three years of his presidency, Chávez used metaphors in an attempt to create a discourse of national refoundation while breaking with past governments. The most common conceptual metaphor was THE NATION IS A RESURRECTING PERSON, which implies that a new beginning is taking place: the nation was "dead," "finished," but now that Chávez is in power, the nation is "born again." This is also supported by another personification about the nation represented by the conceptual metaphor THE NATION IS A RECOVERING PERSON.

The prominent role of the nation during Chávez's first three years (46% of all metaphors), coupled with the fact that he represented his arrival to power as "a resurrection," suggests that Chávez conceptualized the Bolivarian Revolution as a process of nation refoundation. The analysis also revealed the presence of an important conceptual metaphor in Chávez's discourse: THE NATION IS CHÁVEZ. This conceptualization suggests that Chávez's opponents are likely to be represented in his discourse as adversaries of the nation.

By conceptualizing his political project as a revolution, Chávez evokes a new beginning where his revolution is at the center of a fundamental change. Further analysis of Chávez's metaphors to conceptualize his political project revealed that conflict

metaphors were the most frequent types of metaphors between 1999 and 2001, accounting for 28% of all metaphors. All conflict metaphors represented the Bolivarian Revolution as war (THE BOLIVARIAN REVOLUTION IS WAR). By using conflict metaphors to conceptualize his political project, Chávez attributes to his revolution the violent element that it lacks. This contributes to legitimize his project as a genuine revolution, which implies a violent change followed by a new beginning.

In the 2001 speech, Chávez explicitly said that his revolution was the continuation of Bolívar's independence revolution. This statement suggests that opposing the Revolution is the same thing as opposing the nation (given that Bolívar is considered the founder of the nation in the collective imaginary of Venezuelans). Also, by representing his political project as the continuation of Bolívar's project, Chávez produces an erasure effect that serves his purpose of breaking with previous governments. Not only he conceptualizes his political project as a new beginning vis-à-vis previous governments, he tries to make them invisible to his audience.

All metaphors about opponents from the 1999 and 2000 speeches referred to former governments, whereas in the 2001 speech 87% of all metaphors referred to current opponents. Former governments were mainly conceptualized by using destruction and nature metaphors, while current opponents were only conceptualized by using conflict metaphors.

The main conceptual metaphors identified for former governments were: FORMER GOVERNMENTS WERE COLLAPSING BUILDINGS, FORMER GOVERNMENTS WERE UNCONTROLLED VEHICLES, and FORMER GOVERNMENTS WERE DESTRUCTIVE AGENTS. The three conceptualizations are consistent with the argument that, in his first three years in office, Chávez wanted to

break with the past (as part of his national refoundation discourse). All of them imply starting over: after a building collapses, it needs to be rebuilt; after someone has been run over by a vehicle, the person needs to recover; after a disaster, reconstruction begins.

As far as current opponents are concerned, they were mainly conceptualized with conflict metaphors (73% of all metaphors). The conceptual metaphor used was CURRENT OPPONENTS ARE COMBATANTS. Current opponents started being conceptualized metaphorically in the 2001 speech. In fact, 87% of all metaphors referring to opponents in the 2001 speech had current opponents as their target domain.

All metaphors used to conceptualize the opposition (either former governments or current opponents) had negative connotations. This, coupled with the fact that the Bolivarian Revolution was exclusively conceptualized as “war,” contributed to create a discourse in which opponents started to be marginalized. Also, the shift of focus from “former governments” to “current opponents,” combined with the fact that current opponents were mainly represented as combatants, suggests a transition in the objectives of Chávez’s discursive practices from “refounding the nation” to “polarizing the nation.” This will be explored in the next chapter, which covers Chávez’s speeches from 2002 until 2004.

Chapter 5: Polarizing a Divided Nation - Analysis of Data (2002-2004)

This chapter, which presents and analyzes the results of the study from 2002 through 2004, shows how Chávez's primary rhetorical objective during that period was to polarize an already divided country. He did this by gradually creating a discourse in which his Bolivarian Revolution was mainly conceptualized as a conflict between supporters and opponents. In this discourse, the opposition was first defined only in terms of Venezuelan opponents, but later in terms of allies of US imperialism as well. By creating a polarized political environment, and by portraying his opponents as allies of US imperialism, Chávez contributed to constructing a discourse in which opposing his Bolivarian Revolution is conceptualized as opposing the nation.

After an overview of the three speeches considered for this period, I analyze the metaphors used by Chávez in those speeches by the three main target domains examined in this dissertation. Then, I analyze each of these domains in relation to their source domains in order to show how those metaphors contribute to Chávez's efforts to polarize the country, and to portray opponents as allies of US imperialism and as enemies of the nation.

5.1. Speeches and Their Contexts (2002-2004)

The first speech took place on April 11, 2002 and consisted of 9,674 words. The speech was aired on all television channels and radio stations in the country. It was a response to the widespread unrest and political instability that characterized the first half of April 2002. The main purpose of the speech was to show to the nation that the rumours of a coup d'état were untrue. Thus, in the first part of the speech, Chávez said:

[P]onen a correr un rumor de que Chávez ya está preso del Alto Mando.
De que Chávez ya está renunciando. Que lo que falta es un empujoncito.
Mentira, no, mentira. La situación es otra. Esa es la realidad.

During the speech, the president kept noting the time of day in an attempt to show that the speech was being held live. For instance, at the beginning of the speech he said:

[H]e tomado la decisión, cuando falta según mi reloj, 15 minutos para las 4 de la tarde, de convocar esta cadena nacional de radio y televisión para enviar un mensaje a todos los venezolanos.

Later on, Chávez said:

[Y]o hago un llamado y le pido a Dios que les lance un rayo de reflexión a los que están como enloquecidos enceguecidos por sentimientos ¿de qué tipo? No sé, y entonces pretenden llegar aquí como sea. ¿Qué puede pasar, digo yo, cuando son las 4:30 de la tarde, faltan 23 minutos para las 5 de la tarde.

It is important to mention that there were two demonstrations organized that day in Caracas, one by Chávez's supporters and another one by his opponents. They ended up in a massacre in the center of city, followed by a failed coup d'état.

The speech lasted one hour and forty-two minutes. When it started, at 3:54 pm, more than ten people had already been killed in the massacre. Shortly after its beginning, commercial television channels divided the screen into two halves and showed images of what was taking place on the streets of Caracas. At approximately 4:30 pm, the president announced that he had shut down three commercial channels: Channels 2, 4 and 10 (Olivares 111-13).

At 5:20 pm, in a middle of one of the worst crises in cotemporary Venezuelan history, and after an increasing number of military garrisons have withdrawn their support to the president, Chávez concluded his speech by saying:

Les reitero un mensaje de afecto, les reitero un mensaje de paz, les reitero un mensaje de esperanza, de firmeza, de solidaridad, de calma y de cordura a todo este pueblo venezolano, a toda esta sociedad venezolana.
Muchísimas gracias y muy buenas tardes, señoras y señores.

The day finished with 19 deaths and more than 200 wounded. Twelve of the people who died were participating in the opposition march that was trying to reach the Palacio de Miraflores (Venezuela's presidential palace) in order to request Chávez's resignation. The remaining seven people killed that day were Chávez supporters who were participating in a counter-demonstration convoked by top government officials in front of the Palacio de Miraflores. The purpose of the counter-demonstration was to defend the government from what was the government defined as an "intento de asalto" (Chirinos "Muertes sin responsables").²⁹

At dawn the next day, Lucas Rincón, the minister of defense, announced in *cadena nacional* that the army had asked Chávez to resign and that he had accepted. On April 12, while a temporary government was being put in place, one of Chávez's daughters, María Gabriela Chávez, announced to the country that she had spoken with her father and that he had told her that he had not resigned. Shortly after, Isaías

²⁹ Nobody has yet been held accountable for the killings. Three high-ranking police officers (Henry Vivas, Lázaro Forero and Iván Simonovis) are currently in jail accused by the government of being responsible for the massacre. However, none of them has yet been brought to trial. Alfredo Romero, representative of the local nonprofit organization VIVE (Víctimas Venezolanas de Violación a los Derechos Humanos) claims that "El Estado venezolano es total y absolutamente responsable de los hechos ocurridos el 11 de abril, ya sea por acción o por omisión". This is based on video footage that shows that the National Guard did not intervene when the shootings were taking place (Chirinos, "Muertes sin responsables").

Rodríguez, the attorney general, demanded the temporary government to clarify whether a coup d'état had taken place (Giusti 110-111).

On April 13, on his second day as temporary president of Venezuela, Pedro Carmona Estanga (former president of Fedecámaras, the Venezuelan Federation of Chambers of Commerce) was asked by members of the military to reinstate branches that his government had dissolved, including the National Assembly and the Supreme Court.³⁰ Carmona's short term in office was characterized by lootings, military uprisings, repression, and dozens of deaths (112). On April 14, after the failed coup d'état, Chávez returned to power.

The events that took place between April 11 and April 14, 2002 are considered a turning point in contemporary Venezuelan history (López Maya, "The Bolivarian Movement"). From a discursive point of view, it seems that Chávez began to construct a different type of discourse as a result of those events. This new discourse is mainly characterized by the president's efforts to: (a) polarize an already divided country, and (b) portray opponents as allies of US imperialism. Both these premises will be developed in the analytical part of this chapter.

The second transcription examined for this period was not taken from a traditional political speech but from *Aló Presidente*, Chávez's weekly television show. The episode analyzed here was aired by the state television channel on June 13, 2003, and consisted of 11,964 words. In *Aló Presidente*, the president interacts with the studio audience, with his guests, and with the television audience by telephone. The president uses an informal register and talks about topics of general interest related to the achievements of

³⁰ Raúl Baduel, who in 2007 openly opposed Chávez's proposal to reform the Constitution, was one of the military men who helped to return Chávez to power in 2002.

his administration. Often he tells personal anecdotes, recites poems, and sings popular songs.

The *Aló Presidente* of June 13, 2003 was transmitted from the Palacio de Miraflores. The main purpose of the show was to highlight the advances of the revolution six months after the end of the national strike that paralyzed the Venezuelan oil industry. In the show, Chávez interviewed Alí Rodríguez Araque, president of the Venezuelan state oil company PDVSA, and showed a video about the state of the country's oil industry. The video ended with these words:

Estos logros demuestran la capacidad e inquebrantable voluntad del gobierno bolivariano para defender nuestra industria petrolera y ponerla al servicio de su auténtico dueño, el pueblo, en ratificación de soberanía nacional generando riqueza y bienestar para todos los venezolanos. Ahora sí es, Petróleos de Venezuela, un valor soberano.

Chávez also spoke about *Misión Robinson*, one of the emergency social programs that his government has been introducing since 2002.³¹ The plan, named after the pseudonym adopted by Simón Rodríguez, one of Bolívar's mentors, is intended to eradicate illiteracy in Venezuela. In the show, Chávez said:

[C]omenzó el Plan Robinson, la Misión Robinson, precisamente con la consigna bolivariana “un pueblo ignorante es instrumento ciego de su propia destrucción,” y si le damos la vuelta a la moneda debemos decir: “un pueblo sabio es instrumento inexorable de su propia liberación, de su

³¹ *Las misiones* are social programs aimed at providing access to diverse social rights. They have been presented as emergency and/or temporary plans to attack certain urgent social needs of the poor. Despite the fame of the *misiones* outside Venezuela, their structure and implementation remain unclear (López Maya, *Del viernes negro*, 355).

propia felicidad, de la construcción de su propio ser, por ahora y para siempre.”

It is important to note that this *Aló Presidente* was transmitted in an environment of increasing polarization and division in Venezuelan politics. On August 19, 2003, the Organization of American States received a petition signed by 3.5 million Venezuelans requesting a recall referendum on Chávez’s presidency. The collection of signatures was not recognized as official by the government. On November 28, 2003, the opposition collected signatures again for a recall referendum against Chávez. The opposition claimed to have collected 3.8 million signatures. The referendum took place on August 15, 2004 and was won by Chávez with 59% of the votes (BBC News, “Venezuelan Audit”).

The last transcription considered for this period corresponds to a speech given after a pro-government march called *Marcha por la paz y contra el paramilitarismo en Venezuela*. The speech consisted of 11,055 words and was aired by the state television channel on May 16, 2004. The pro-government march was convoked after the capture on May 9 of a group of over 100 Colombian men, dressed in Venezuelan army uniforms, in a hacienda in El Hatillo, a suburb of Caracas. Also, this speech took place only three months before the recall referendum of August 15, 2004.

While the Venezuelan government accused the group of Colombian men of being paramilitaries involved in a “rebelión armada” aimed at overthrowing Chávez’s government, the opposition claimed instead that they were Colombian immigrants in search of work, who were set up by government officials. The opposition described the operation as a manoeuvre by the government to distract attention from the recall referendum. In October 2005, a Venezuelan military tribunal sentenced 27 of the 112

men to six years in jail. In August 2007, before an official visit to Colombia, Chávez pardoned 41 of the 112 men (Chirinos, “Chávez indulta”).

The incident of the so-called Colombian paramilitaries allowed Chávez to introduce a new element to his political discourse: anti-imperialism. Colombian paramilitaries have often been linked to units of the Colombian military, which in turn receives substantial funding from the US government (Human Rights Watch, The Ties That Bind). Thus, in the speech of May 16, 2004, one week after the incident, Chávez said:

[N]unca como ahora desde aquí desde esta revolución nosotros habíamos señalado al imperialismo como lo estamos señalando, es decir, lo ratifico aquí, la revolución bolivariana después de cinco años y tres meses y un poco más de gobierno, y después haber pasado por varias etapas, ha entrado en la etapa antiimperialista.

5.2. Overview of Chávez’s Metaphors by Target Domain (2002-2004)

This section examines all metaphors used by Chávez to conceptualize the three target domains analyzed in this dissertation for the period 2002-2004. As was the case for the period 1999-2001, metaphors to conceptualize the nation included those metaphors used when referring to the country as well as those used when referring to its citizens. Metaphors to conceptualize Chávez’s Bolivarian Revolution included those used when referring to his revolution and his government’s plans, as well as those used when referring to himself as the leader of his revolution. Finally, metaphors to conceptualize his political opposition included those used in the analysis of the period 1999-2001 (metaphors referring to former governments and to current opponents), as well as those used to refer to US imperialism, which did not appear in Chávez’s discourse until 2004.

A total of 126 metaphors conceptualizing the Venezuelan nation, Chávez's Bolivarian Revolution, and Chávez's opposition were identified in the three transcriptions examined in this chapter. The identification of metaphors was carried out following the methodology provided by Critical Metaphor Analysis described in Chapter 2 of this dissertation.

Out of the 126 metaphors identified, 26% (33 metaphors) were used to conceptualize the nation, 35% (44 metaphors) were used to conceptualize Chávez's Bolivarian Revolution, and 39% (49 metaphors) were used to conceptualize Chávez's opposition. These findings, summarized in the table below, show the prominent role of the opposition in Chávez's political discourse during this three-year period. This differs from the first three years analyzed, in which the nation had the most prominent role.

Table 1
Number of Metaphors by Target Domain (2002-2004)

| | 2002 | 2003 | 2004 | Total | |
|--------------|-------------|-------------|-------------|--------------|-----|
| Nation | 9 | 14 | 10 | 33 | 26% |
| Revolution | 5 | 11 | 28 | 44 | 35% |
| Opposition | 16 | 10 | 23 | 49 | 39% |
| Total | 30 | 35 | 61 | 126 | |

The 2002 speech, given on the day of the coup d'état, shows the highest percentage of metaphors to conceptualize the opposition: 53% (16 out of 30), compared to 29% (10 out of 35) for the *Aló Presidente* of 2003 and 38% (23 out of 61) for the speech of 2004. The stronger presence of metaphors about the opposition in the 2002 speech may be attributed to the critical circumstances within the context of the coup d'état. Given that the focus of the speech was on the insurrectional actions started by the opposition, it is not surprising that more than half of the metaphors analyzed from that speech were used by Chávez to conceptualize the opposition.

The following excerpt from the 2002 speech illustrates the central place of the opposition in Chávez's discourse at that time:

Estos señores irresponsables que sin ningún fundamento llaman a un paro indefinido, absolutamente insurreccional y, así lo denunció ante Venezuela y ante el mundo. El objetivo de esta gente no es parar al país, no se engañen (...) hay que hacer un llamado a que recuperen la racionalidad a que recuperen el sentido de responsabilidad por este su país, y piensen en las consecuencias funestas que pudiera haber en una situación que está provocándose.

Another interesting observation is the gradual increase of metaphors used to conceptualize Chávez's Bolivarian Revolution, from 17% (5 out of 30) in 2002, to 31% (11 out of 35) in 2003, to 46% (28 out of 61) in 2004. These figures suggest an attempt by the government to consolidate Chávez's Bolivarian Revolution as a direct result of the coup d'état of 2002. This is confirmed by the emergence of *las misiones*, considered the most distinctive feature of Chávez's revolution (López Maya, *Del viernes negro*, 355).

Since 2003 the government has created 21 *misiones*. Some of the most well known are: *Misión barrio adentro* (to guarantee access to health services), *Misión mercal* (to provide food at reasonable costs), *Misión milagro* (to facilitate eye surgeries to the poor), *Misión negra Hipólita* (to assist homeless people in general and homeless children in particular), *Misión Ribas* (to help adults complete high school), *Misión Robinson I* (to

eradicate illiteracy), and *Misión vuelvan caras* (to fight poverty)³² (Gobierno en Línea, “Misiones”).

Finally, it is interesting to note that the proportion of metaphors used to conceptualize Chávez’s opposition reached a peak of 53% (16 out of 30) in 2002 after the gradual increase reported for the period between 1999 and 2001. As mentioned before, for 2003 and 2004 the proportions were 29% (10 out of 35) and 38% (23 out of 61) respectively. The peak of 53%, closely related to the polarized context after the coup d’état, suggests that metaphors are central in Chávez’s political discourse: he chose more metaphors to target the opposition at the most critical moment of his relationship with the opposition (when he was probably trying to create more persuasive belief systems about the opposition). This observation is consistent with Charteris-Black’s argument that, in political discourse, the choice of metaphors is central in the creation of persuasive beliefs systems (Charteris-Black, *Politicians and Rhetoric* 204).

³² The effectiveness of *las misiones* has been questioned in the last few years. Their poor performance and lack of organization have been blamed for contributing to Chávez’s loss of popularity, which led to his losing the referendum on the constitutional reform in December 2007. After an extensive visit to many slums in Caracas in January 2008, Álvaro Vargas Llosa reported this in an article for the Independent Institute:

Tras una extenso recorrido por los barrios pobres de esta capital, estoy convencido de que el presidente venezolano perdió el reciente referéndum con el que procuraba legitimar su intención de buscar la reelección indefinida no porque sus compatriotas valoran la democracia sino porque sus programas sociales se están desmoronando (...) las misiones están plagadas de corrupción, corroídas por la ineficiencia y severamente golpeadas por la inseguridad y las escaseces que se han convertido en el drama cotidiano de la sociedad venezolana. (Vargas Llosa, “En las misiones”).

Table 2, which contains the breakdown of the target domain “Chávez’s opposition” for the three years examined, shows a shift in the type of opposition conceptualized in Chávez’s speeches between 2002 and 2004.

Table 2
Number of Metaphors with Target Domain “Opposition” (2002-2004)

| | 2002 | 2003 | 2004 | Total |
|--------------------|-------------|-------------|-------------|--------------|
| Former Governments | 1 | 0 | 0 | 1 |
| Current Opposition | 15 | 10 | 6 | 31 |
| US Imperialism | 0 | 0 | 17 | 17 |
| Total | 16 | 10 | 23 | 49 |

In the 2002 and 2003 transcriptions, most metaphors targeting Chávez’s opposition referred to current opponents, only one metaphor referred to former governments. These findings confirmed the trend identified for the period 1999-2001, when the president’s focus shifted from previous governments in 1999 and 2000, to present opponents in 2001.

In 2004, Chávez announced the beginning of the anti-imperialistic stage of his revolution. This announcement translated into the emergence of a new opponent in Chávez’s discourse: US imperialism. Thus, in the 2004 speech, Chávez used 17 metaphors (74% of all metaphors used to conceptualize the opposition) to refer to US imperialism.

5.3. Source Domains in Chávez's Metaphors (2002-2004)

As for the period 1999-2001, all 126 metaphors were classified according to their source domains and conceptual metaphors were identified for each of them. This was carried out following the methodology provided by Critical Metaphor Analysis and by cognitive linguistics described in Chapter 2 of this dissertation.

In the three speeches examined in this chapter, the most frequent source domains were personification and conflict, which were also the most frequent ones in the 1999-2001 period. Other frequent source domains included morality, journey and market.

Table 3 illustrates these findings.

Table 3
Number of Metaphors by Source Domain (2002-2004)

| | 2002 | 2003 | 2004 | Total | |
|-----------------|-------------|-------------|-------------|--------------|-----|
| Personification | 9 | 10 | 19 | 38 | 30% |
| Conflict | 6 | 7 | 21 | 34 | 27% |
| Morality | 4 | 2 | 4 | 10 | 8% |
| Journey | 1 | 2 | 4 | 7 | 6% |
| Market | 1 | 6 | 0 | 7 | 6% |
| Construction | 2 | 1 | 2 | 5 | 4% |
| Crime | 2 | 3 | 0 | 5 | 4% |
| Health | 4 | 0 | 0 | 4 | 3% |
| Life/Death | 0 | 0 | 4 | 4 | 3% |
| History | 0 | 1 | 2 | 3 | 2% |
| Destruction | 0 | 2 | 1 | 3 | 2% |
| Others | 1 | 1 | 4 | 6 | 5% |
| Total | 30 | 35 | 61 | 126 | |

Personification was the most common type of metaphor in Chávez's discourse for the period 2002-2004, accounting for 30% (38 metaphors). It is interesting to note that the analysis of the period 1999-2001 revealed very similar findings, with personifications accounting for 28% of all metaphors.

The breakdown of Chávez’s personification metaphors by target domain for the period analyzed reveals that 17 out of the 38 metaphors found (or approximately 45%) were used to describe the nation, a total of 14 metaphors (or approximately 37%) were used to describe US imperialism, and 7 (or approximately 18%) were used to describe Chávez’s Bolivarian Revolution.

As in the period 1999-2001, the most frequent target domain described through personification was the nation. However, in the period 1999-2001, the nation accounted for 82% of all metaphors compared to 45% for the period 2002-2004. The difference is partly due to the introduction in 2004 of the target domain US imperialism, which accounted for 37% of all metaphors analyzed for the period 2002-2004. Table 4 summarizes the number of personification metaphors by target domain for the period 2002-2004.

Table 4
Number of Personification Metaphors by Target Domain (2002-2004)

| | 2002 | 2003 | 2004 | Total | |
|--------------------------------|-------------|-------------|-------------|--------------|-----|
| Nation | 5 | 8 | 4 | 17 | 45% |
| Revolution | 4 | 2 | 1 | 7 | 18% |
| Opposition (US Imperialism) | 0 | 0 | 14 | 14 | 37% |
| Total | 9 | 10 | 19 | 38 | |

5.4. Conceptualizing the Nation

5.4.1. Reconceptualizing the Nation: From “Resurrecting Person” to “Active Agent”

The analysis of Chávez’s metaphors to describe the nation for the period 2002-2004 shows that most of his metaphors (52%) were personifications. Other metaphors

used by the president included market metaphors (18%), construction metaphors (9%), and conflict metaphors (6%). These findings are illustrated in the following table:

Table 5
Number and Types of Metaphors for the Target Domain “Nation” (2002-2004)

| | 2002 | 2003 | 2004 | Total | |
|-----------------|----------|-----------|-----------|-----------|-----|
| Personification | 5 | 8 | 4 | 17 | 52% |
| Market | 1 | 5 | 0 | 6 | 18% |
| Construction | 2 | 0 | 1 | 3 | 9% |
| Conflict | 0 | 0 | 2 | 2 | 6% |
| Others | 1 | 1 | 3 | 5 | 15% |
| Total | 9 | 14 | 10 | 33 | |

The transcription that showed more cases of personifications when describing the nation was the 2003 *Aló Presidente*: as much as 8 personifications out of the total of 17 (or approximately 47%). This is consistent with the fact that, overall, the 2003 *Aló Presidente* had a stronger presence of nation metaphors (40% of all metaphors for 2003), compared to 30% and 16% for 2002 and 2004 respectively. The nationalistic angle of Chávez’s discourse here is evidenced by the number of times he cited Simón Bolívar: 11 times for 2003, compared to only one time in 2002 and none in 2004.

In the period 2002-2004, personifications were used by Chávez to conceptualize the nation as a healthy and vigorous person, capable of using all her senses. This contrasts enormously with the period 1999-2001, when the nation was presented as a “recovering person.” The conceptual metaphor that describes the new role of the country in Chávez’s discourse is THE NATION IS AN ACTIVE AGENT.

Thus, in the 2002 speech Chávez said: “el país es testigo de todo este esfuerzo,” “el país los vio, el país completo los vio,” “acudo a algo que es propiedad del estado, que son las señales para que el país lo vea o el país lo oiga,” “Así que las voces serias del

país, yo les hago este llamado para que unamos nuestras mentes, nuestras incluso oraciones y corazones.”

The role of “active agent” assigned by Chávez to the nation intensified in the 2003 *Aló Presidente* and in the 2004 speech. More than simply an “active agent,” the nation became a political militant, demonstrating on the streets and ready to fight for her rights: “este país comenzó a ser soberano, ahora sí, dueño de sí mismo,” “el gran pensador aquí se llama el pueblo de Venezuela, que hoy piensa y actúa,” “más allá un pueblo acompañándolos a ustedes en la marcha,” and “del pueblo todo de Venezuela, que sale unido a exigir respeto para la Patria, respeto para Venezuela.”

The “active agent” conceptualization of the Venezuelan nation can be illustrated by the romantic myth that on the day of the coup d’état of April 11, Chávez was returned to power after thousands of Venezuelans took to the streets of Caracas demanding his return. This romantic myth spread around the world after the 2003 release of the Irish documentary, *The Revolution Will Not Be Televised*, directed by Kim Bartley and Donnacha O’Briain. In reality, and as mentioned in the description of the corpus, Chávez came back to power after a group of members of the military asked the de facto government led by Carmona to reinstate the branches that it had dissolved, including the National Assembly and the Supreme Court.

5.4.2. Other Conceptualizations of the Nation and “The Nation Is Chávez”

Market and construction metaphors were also used by Chávez to conceptualize the nation. Market metaphors mainly included conceptualizations of “the nation as a commodity.” For instance, in 2002, Chávez said “para avanzar, para construir con la consigna de que Venezuela es de todos y de que Venezuela es para todos,” “Venezuela es de todos, no es de un pequeño grupo, sino es de todos ustedes,” “Venezuela es de todos y

cada día será más de todos y para todos nosotros,” “no se vende este país,” “y su pueblo dueño de su país,” and “[una patria] para todos, bonita para todos.”

Venezuelan historian Ramón Guillermo Aveledo argues that the slogan “Ahora Venezuela es de todos,” which is widely used in government documents and websites, in fact suggests that Venezuela now belongs to Chávez:

Así que el slogan “Ahora Venezuela es de todos,” que hacia afuera tiene un potente poder de venta como una democracia viva, y que los numerosos partidarios del Presidente y su régimen interpretan con “O sea, ya no es nada más de los que antes se aprovechaban de ella, en realidad quiere decir que ahora es “de todos” y no “de cada uno,” pero hay uno que nos representa a todos, porque encarna lo que a todos nos conviene. (52)

According to Aveledo “todos” (the people of Venezuela) is equivalent to Chávez. His argument, which relies on the conceptualization THE PEOPLE (or THE NATION) IS CHÁVEZ, is corroborated by the example found in the analysis of the period 1999-2001 previously mentioned.

In the 2004 speech, there were two personifications and one conflict metaphor described by the conceptual metaphor THE PEOPLE (or THE NATION) IS A SUPPORTER OF CHÁVEZ. So, while addressing his supporters Chávez said: “aquí está el pueblo venezolano diciendo una vez más al mundo que Venezuela se respeta,” then he said “más allá un pueblo acompañándolos a ustedes en la marcha,” and finally he said “del pueblo todo de Venezuela, que sale unido a exigir respeto para la Patria, respeto para Venezuela.”

These cases suggest that all Venezuelans (the people or the nation) support Chávez. This has similar implications as THE PEOPLE (or THE NATION) IS CHÁVEZ

given that, in THE PEOPLE (or THE NATION) IS A SUPPORTER OF CHÁVEZ, opponents of Chávez are not conceptualized as part of the Venezuelan nation.

It is interesting to note that the conceptual metaphor THE NATION IS CHÁVEZ gives meaning to the conceptual metaphor THE NATION IS AN ACTIVE AGENT. That is to say, if the nation is an active agent who fights for her rights, and if the nation is Chávez (or his supporters), then adversaries of Chávez become adversaries of the “active agent” (the nation). Therefore, by conceptualizing the nation as an active agent ready to fight for her rights, Chávez further contributes to polarizing the country between supporters and adversaries.

Conceptualizing Venezuela as a commodity, as something of enormous value, is based on the old myth of El Dorado,³³ which is central to the collective representation that Venezuelans share about their country: that Venezuela is the richest country in the world, “escogido por la Providencia para derramar sobre él las bendiciones inagotables de sus recursos naturales” (Aveledo 46). Bolívar used this imaginary for political purposes during the war of independence. Aveledo argues that *El Correo del Orinoco*, the patriotic propagandistic paper edited by Bolívar in Angostura, talked about “las ilimitadas riquezas de esta tierra como anzuelo para la solidaridad e imán para el apoyo de quienes, mañana, podían estar interesados en ayudar su causa” (46).

³³ In his book *The Magical State*, the Venezuelan anthropologist Fernando Coronil refers to the myth of El Dorado as follows:

The mirage of El Dorado had haunted the early conquerors who were drawn ever deeper into the Amazonian jungle in their obsessive quest for the riches that indigenous people assured them lay just behind the next mountain. This mirage reappeared faintly with every discovery of mineral wealth throughout succeeding centuries. With the gushing forth of oil, the submerged images of El Dorado shone again brightly, appearing as endless streams of black gold circulating throughout the vessels of the social body, nourishing it and awaiting capture.

Finally, in terms of construction metaphors, in the 2002 speech Chávez talks about “construir un país con el amor y el esfuerzo de todos,” and “queremos construir el gran país que siempre hemos soñado.” In 2004, he spoke about “[movimientos] que comparten con el Gobierno la tarea de construir la Patria nueva.” All these metaphors share the conceptual metaphor THE NATION IS A BUILDING, which contrasts a great deal with the conceptual metaphors for the source domain “construction” identified in the 1999-2001 speeches: VENEZUELA IS A DESTROYED BUILDING.

Again, based on the conceptual metaphor THE NATION IS CHÁVEZ, it is safe to say that the conceptualization THE NATION IS A BUILDING contributes to solidify Chávez’s position vis-à-vis the opposition. This is due to the fact that both parties are at war (THE BOLIVARIAN REVOLUTION IS WAR), but one (*chavismo*) is conceptualized as a strong building, while the other (the opposition) is not. The following section analyzes the conceptual metaphor THE BOLIVARIAN REVOLUTION IS WAR.

5.5. Intensifying the Concept of the Bolivarian Revolution as War

As was the case in the period 1999-2001, the analysis of metaphors used by Chávez to conceptualize his revolution between 2002 and 2004 shows that conflict metaphors were the most frequent types of metaphors, accounting for 43% of all metaphors. This represents an increase from the 28% identified for the first three years. Conflict metaphors were followed by personifications (16%) and journey metaphors (14%). Table 6 illustrates these findings:

Table 6
Number of Metaphors by Source Domain for “Chávez’s Bolivarian Revolution”
(2002-2004)

| | 2002 | 2003 | 2004 | Total | |
|-----------------|-------------|-------------|-------------|--------------|-----|
| Conflict | 0 | 4 | 15 | 19 | 43% |
| Journey | 4 | 2 | 1 | 7 | 16% |
| Personification | 1 | 2 | 4 | 7 | 16% |
| Life/Death | 0 | 0 | 3 | 3 | 7% |
| Construction | 0 | 1 | 1 | 2 | 4% |
| Others | 0 | 2 | 4 | 6 | 14% |
| Total | 5 | 11 | 28 | 44 | |

As was the case for the first three years, Chávez conceptualized his revolution as war in all 19 conflict metaphors for the 2002-2004 period. That is to say, the conceptual metaphor THE BOLIVARIAN REVOLUTION IS WAR was underneath each and every one of the cases.

It is interesting to note that the 2002 speech, which took place in the context of the coup d’état, did not contain any conflict metaphors related to Chávez’s revolution. All conflict metaphors in that speech related exclusively to the opposition, which was the main focus of the speech. In addition, as much as 15 out of the 19 conflict metaphors used by Chávez to conceptualize his Bolivarian Revolution appeared in the 2004 speech. This represents 79% of all conflict metaphors about his Bolivarian Revolution.

The high proportion of conflict metaphors to conceptualize his revolution in the 2004 speech seems to be closely linked to Chávez’s introduction of US imperialism as a major threat to the nation in 2004. While before 2004 his revolution was mainly conceptualized as a domestic conflict with Venezuelan political opponents, in 2004 it became a “war against US imperialism.” Some examples of Chávez’s conceptualization of his revolution as war in the period 2002-2004 included:

Yo lo he dicho, lo repito aquí hoy, el Hugo Chávez del 2002 quedó para la historia. No voy a dejarme acorralar por nada ni por nadie. Estamos listos para enfrentar cualquier amenaza

And also included:

Se trata ahora de la incorporación masiva del pueblo venezolano a la defensa integral del territorio, en todas partes, para ello cada ciudadano debe considerarse un soldado.

It is interesting to note that most conflict metaphors used by Chávez to conceptualize his revolution in 2004 represented his government plan as a military “línea estratégica.” Thus, Chávez says: “Esa línea estratégica quiero que la amplíemos, que la profundicemos, que la consolidemos,” “pero yo voy a enunciar algunas gruesas líneas estratégicas acerca de lo que considero debemos hacer,” “Revisando la Constitución aquí está la línea estratégica de mayor dimensión; la defensa nacional,” “Yo hasta ahora lanzo tres líneas estratégicas para comenzar a darle forma al concepto de defensa integral de la Nación, como lo señala la Constitución Bolivariana,” “La tercera línea estratégica en la que quiero insistir esta tarde tiene también mucha importancia, toca la médula del concepto de la defensa integral.”

In some cases Chávez did not use the adjective “estratégica” but kept the concept of “lineamiento” related to a military operation: “como comandante en jefe de la Fuerza Armada ya he comenzado a dar los lineamientos para abrir los canales, para abrir los cauces a la participación popular masiva en la defensa nacional integral,” and “Así que en los próximos días, en las próximas semanas, con la asesoría del Consejo de Defensa de la Nación como manda la Constitución y la Ley, comenzaré a emitir directrices y lineamientos.”

As noted in the analysis of the first three years, by conceptualizing his Bolivarian Revolution as war, Chávez attributes to his revolution the violent element that it lacks. This contributes to legitimize his project as a real revolution. In addition, in the period 2002-2004, the violent element of his revolution is intensified by the emergence of a foreign threat: US imperialism. Also, by conceptualizing his Bolivarian Revolution as war, Chávez contributes to the polarization of the nation given that opponents are not seen as political adversaries but as war enemies. Conceptualizations of political adversaries will be analyzed in section 5.5.

5.5.1. The Bolivarian Revolution as the Continuation of Bolívar's Independence Wars

As mentioned in chapter 4, CMA was not used to identify representations of Chávez's Bolivarian Revolution as the continuation of Bolívar's independence wars. Instead, the identification of cases of "Chávez's Bolivarian Revolution as Bolívar's independence wars" involved any explicit reference that indicated that Chávez was representing his project as the continuation of Bolívar's independence wars.

The trend identified in the 2001 speech, where Chávez explicitly presented his Bolivarian Revolution as the continuation of the independence wars, manifested itself in the period 2002-2004 as well. For instance, in the 2003 *Aló Presidente* Chávez said:

[E]l proyecto bolivariano, el proyecto unitario, el proyecto liberador, el proyecto igualador, el proyecto de la felicidad, la mayor suma de felicidad para un pueblo, y ese es el proyecto que ha regresado ahora

Similarly, in his 2004 speech Chávez traced a parallel between the independence war of 200 years ago and his Bolivarian Revolution:

[N]osotros nos hemos convertido, desde 1989, en la vanguardia alternativa de la América Latina, y eso es parte de los sucesos que hemos vivido, que estamos viviendo y que seguiremos viviendo, cada venezolano consciente debe saberlo muy bien, y debe sentirse orgulloso de formar parte de la vanguardia alternativa que abre un camino de salvación a los pueblos de este Continente, una vez más, como hace 200 años, nos ha tocado a nosotros los venezolanos y venezolanas.

By presenting his Bolivarian Revolution as the continuation of the independence wars of 200 years ago, Chávez provokes the same erasure effect described in the analysis of the period 1999-2001, making previous governments invisible to his audience. Also, as previously mentioned, the representation of his revolution as the continuation of Bolívar's independence wars creates a conceptualization of political opponents as enemies of the nation.

5.5.2. Other Conceptualizations of Chávez's Bolivarian Revolution:

Personifications and Journey Metaphors

Journey metaphors and personifications were also used by Chávez to conceptualize his Bolivarian Revolution. Some journey metaphors that appeared in the period 2002-2004 included: "la revolución bolivariana hoy está señalando el rumbo," "esta nueva etapa en la que hemos entrado en la revolución," and "esta revolución seguirá avanzando a paso de vencedores."

Some personifications included: "revolución pacífica [...] tolerante, abierta reflexiva, constructiva," and "los que adversan esta revolución pacífica y democrática, respetuosa de todos los derechos."

5.6. Conceptualizing Opponents as Combatants and Criminals

Before starting with the analysis of the target domain “opposition,” and in order to facilitate the explanation and interpretation of the findings, it is necessary to address an important element related to the classification of metaphors used by Chávez to conceptualize the opposition in the period 2002-2004.

In the metaphor classification used for the period 1999-2001, the target domain “opposition” consisted of two sub-domains: “former governments” and “currents opponents.” As both groups already referred to ensembles of people, they were never classified as personifications but according to their most apparent source domains. In the period 2002-2004, however, the target domain “opposition” not only included “former governments” and “current opponents,” but also a new sub-domain: US imperialism (introduced by Chávez in 2004).

Since US imperialism is a rather abstract domain, we cannot rule out personifications as a possible way to classify metaphors that refer to it. Therefore from 2004, when Chávez spoke about US imperialism for the first time, personifications became part of the possible metaphor classification of the target domain “opposition,” always referring to US imperialism.

5.6.1. Conflict and Crime Metaphors

In the 2002 and 2003 transcriptions, when US imperialism was not yet part of Chávez’s discourse, conflict metaphors accounted for 35% of all metaphors, morality metaphors accounted for 23%, crime metaphors accounted for 19%, and other metaphors accounted for 23%. After the introduction of the US imperialism sub-domain in 2004, personifications accounted for 29% and conflict metaphors accounted for 27%. Other

source domains included morality, crime, health and destruction. Table 7 illustrates the number of metaphors by source domain for the target domain “opposition.”

Table 7
Number of Metaphors by Source Domain for “Opposition” (2002-2004)

| | 2002 | 2003 | 2004 | Total | |
|------------------|-----------|-----------|-----------|-----------|-----|
| Personifications | 0 | 0 | 14 | 14 | 29% |
| Conflict | 6 | 3 | 4 | 13 | 27% |
| Morality | 4 | 2 | 2 | 8 | 16% |
| Crime | 2 | 3 | 0 | 5 | 10% |
| Health | 4 | 0 | 0 | 4 | 8% |
| Destruction | 0 | 2 | 1 | 3 | 6% |
| Others | 0 | 0 | 2 | 2 | 4% |
| Total | 16 | 10 | 23 | 49 | |

Out of the 49 metaphors employed by Chávez to conceptualize the opposition, only one referred to former governments. Its source domain was “crime” and it appeared in the 2002 speech. As noted at the beginning of the chapter, the fact that Chávez only used one metaphor to conceptualize former governments is consistent with the trend identified in the analysis of the period 1999-2001, which revealed that the focus of the president moved from former governments to current opponents.

In the period 2002-2004, all 14 personifications identified (which represent 29% of all metaphors) corresponded to conceptualizations of US imperialism. This reveals a new trend in Chávez’s discursive strategies that started in 2004. This strategy is based on a shift of focus from local opponents to foreign adversaries (represented by US imperialism).

If we classify the 14 personifications by their conceptual metaphors, we realize that all of them but two are related to conflict or crime. The most frequent metaphors conceptualized imperialism as “a cruel combatant,” “an assassin,” “a violent invader,” “an usurper,” and “an old dirty person. Table 8 below shows these findings:

Table 8
Number of Personifications of US Imperialism by Conceptual Metaphor
(2002-2004)

| Conceptual Metaphor | Sub-domain | Number |
|-------------------------------------|-------------------|---------------|
| IMPERIALISM IS A CRUEL COMBATANT | Conflict | 4 |
| IMPERIALISM IS AN ASSASSIN | Crime | 2 |
| IMPERIALISM IS A VIOLENT INVADER | Conflict | 2 |
| IMPERIALISM IS A USURPER | Crime | 2 |
| IMPERIALISM IS AN OLD DIRTY PERSON | Cleanliness | 2 |
| IMPERIALISM IS A DISHONEST SALESMAN | Crime | 1 |
| IMPERIALISM IS A DESTRUCTIVE PERSON | Crime | 1 |
| | | 14 |

If we add the 12 metaphors identified above to the conflict and crime metaphors in Table 7, we can conclude that in the 2002-2004 period a total of 18 metaphors were related to conflict and 11 metaphors to crime. This means that 29 metaphors, or 59% of all metaphors about the opposition, were related to either conflict or crime.

The analysis of the 1999-2001 transcriptions showed a total of 6 conflict metaphors (or 29% of all metaphors) and 2 crime metaphors (or 10% of all metaphors). Therefore, the percentage of metaphors related to either conflict or crime for the period 1999-2001 was 39%, compared to 59% for the period 2002-2004. This increase suggests the construction of a discourse (between 1999 and 2004) where opponents are represented more and more as enemies and criminals.

Some conceptual metaphors targeting the opposition with crime or conflict source domains included: in 2002, THE OPPOSITION IS A REBEL (“estos grupos desesperados para montarse en esta conspiración abierta [...] llamando a través de los medios a una rebelión”), and THE OPPOSITION IS A TERRORIST (“grupos de saboteadores con actitudes de terroristas [...] preparando bombas Molotov”); in 2003,

THE OPPOSITION IS A THIEF (“Estos golpistas que quisieron quitarle al pueblo la comida para que entonces el pueblo saliera a las calles a saquear y para que se generara una violencia y muertos”), and THE OPPOSITION IS AN ASSASSIN (“Cuando empezó la crisis aquí nos quisieron ahorcar y ahogar”); and in 2004, THE OPPOSITION IS A TRAITOR (“no consiguen soldados venezolanos para arremeter contra el pueblo que ahora están importando mercenarios.”), and THE OPPOSITION IS AN USURPER (“no van a poder imponerle a Venezuela jamás otro gobierno que no sea el gobierno que el pueblo de Venezuela se quiera dar libre y soberanamente, no van a poder hacerlo”).

5.6.2. Conceptualizing Opponents as Unpatriotic Citizens Allied with US

Imperialism

The analysis of metaphors classified under the target domain “morality” reveals Chávez’s efforts to represent opponents as unpatriotic citizens lacking ethical and moral values (OPPONENTS ARE UNPATRIOTIC CITIZENS). For instance, in 2002 Chávez said “no hemos tenido la suerte de contar con una oposición seria; con una oposición leal al país.” Similarly, in 2003 he said “se adueñaron de aquella empresa y la colocaron al servicio de intereses contrarios al interés nacional.” In 2004 the president said “se confabularon para arremeter contra Venezuela.” These examples illustrate the main argument of this study, which suggests that Chávez represents opponents as enemies of the nation.

In addition to conceptualizing opponents as unpatriotic citizens with morality metaphors, Chávez uses personifications and conflict metaphors in portraying them as allies of US imperialism. This intensifies the polarization of the country, creating a representation of opponents as traitors to the country. For instance, in the 2004 speech, when referring to the coup d’état of 2002, Chávez said:

[L]a mano extranjera, la quinta columna de los traidores, los sectores de oposición fascista, sectores del alto empresariado nacional, sectores de la Fuerza Armada Venezolana, militares traidores, todos se confabularon para arremeter contra Venezuela.

In the same speech, when speaking about the incident of the alleged Colombian paramilitaries detained in Venezuela, Chávez said:

Miren, la oligarquía venezolana, la oposición fascista venezolana, la oligarquía colombiana antibolivariana y antivenezolana y sus amos en Norteamérica ¿cómo que será que no consiguen soldados venezolanos para arremeter contra el pueblo que ahora están importando mercenarios?

He also added:

[H]oy sencillamente la oligarquía venezolana, la oligarquía colombiana, lacayas las dos del imperialismo norteamericano sembraron los paramilitares aquí en Caracas para tratar de matar al Presidente de Venezuela

Finally, Chávez said:

[S]i este plan internacional que pretende eliminarme físicamente llegara a tener éxito para ellos, esta oligarquía venezolana se va a arrepentir por 500 años, se van a arrepentir por 500 años, y no sólo la oligarquía venezolana, porque yo estoy seguro que una arremetida contra Venezuela de cualquier tipo que ella sea, sangrienta y violenta, promovida por el imperialismo norteamericano y sus lacayos, la quinta columna que aquí tienen sembrada desde hace más de 100 años, estoy seguro que ello generaría una respuesta

muy contundente de solidaridad activa de muchos pueblos de Suramérica y del Caribe.

5.7. Summary of Results for the Period 2002-2004

The analysis of metaphors for the period 2002-2004 indicates that Chávez's primary rhetorical objective was to polarize an already divided country by gradually creating a discourse in which his Bolivarian Revolution was mainly conceptualized as a conflict between supporters and opponents. In this discourse, the opposition was first defined only in terms of Venezuelan opponents, but later in terms of allies of US imperialism as well. By creating a polarized political environment, and by portraying his opponents as allies of US imperialism, Chávez contributed to constructing a discourse in which opposing his revolution is conceptualized as opposing the nation. This supports the main thesis of this dissertation, which argues that behind Chávez's official discourse of inclusion, there is a polarizing discourse of exclusion in which opponents are conceptualized as enemies of the nation.

Out of the 126 metaphors identified, 26% were used to conceptualize the nation, 35% were used to conceptualize Chávez's Bolivarian Revolution, and 39% were used to conceptualize Chávez's opposition. These findings show a more slightly prominent role of the opposition in Chávez's political discourse during this three-year period. This differs from the first three years analyzed, in which the nation had the most prominent role.

The prominent role of metaphors about the opposition, which actually reached a peak of 53% in 2002 when considering both periods (1999-2001 and 2002-2004), seems to be closely related to the polarized context after the coup d'état. This seems to support

Charteris-Black's argument that the choice of metaphor in political discourse is central to the creation of persuasive belief systems.

Personification was the most common type of metaphor in Chávez's discourse for the period 2002-2004, accounting for 30%. The analysis of the period 1999-2001 revealed very similar findings, with personifications accounting for 28% of all metaphors. As in the period 1999-2001, the most frequent target domain described through personification was the nation. However, in the period 1999-2001, the nation accounted for 82% of all personification metaphors compared to 45% for the period 2002-2004. The difference is partly due to the introduction in 2004 of the target domain US imperialism, which accounted for 37% of all metaphors analyzed for the period 2002-2004.

The analysis of Chávez's metaphors to describe the nation for the period 2002-2004 shows that most of his metaphors (52%) were personifications. Other metaphors used by the president included market metaphors (18%), construction metaphors (9%), and conflict metaphors (6%). In the period 2002-2004, personifications were used by Chávez to conceptualize the nation as a healthy and vigorous person, capable of using all her senses. This contrasts enormously with the period 1999-2001, when the nation was presented as a "recovering person." The conceptual metaphor that described the new role of the country in Chávez's discourse was THE NATION IS AN ACTIVE AGENT.

In the 2004 speech, there were two personifications and one conflict metaphor described by the conceptual metaphor THE PEOPLE (or THE NATION) IS A SUPPORTER OF CHÁVEZ. This conceptual metaphor has similar implications as THE PEOPLE (or THE NATION) IS CHÁVEZ given that, in THE PEOPLE (or THE NATION) IS A SUPPORTER OF CHÁVEZ, opponents of Chávez are not conceptualized as part of the Venezuelan nation.

Also, it is important to note that the conceptual metaphor THE NATION IS CHÁVEZ gives meaning to the conceptual metaphor THE NATION IS AN ACTIVE AGENT. That is to say, if the nation is an active agent who fights for her rights, and if the nation is Chávez (or his supporters), then adversaries of Chávez become adversaries of the “active agent” (the nation). Therefore, by conceptualizing the nation as an active agent ready to fight for her rights, Chávez contributes to polarizing the country between supporters and adversaries.

As was the case in the period 1999-2001, the analysis of metaphors used by Chávez to conceptualize his Bolivarian Revolution between 2002 and 2004 showed that conflict metaphors were the most frequent types of metaphors, accounting for 43% of all metaphors. This represents an increase from 28% in the first three years analyzed.

All conflict metaphors represented Chávez’s revolution as war (THE BOLIVARIAN REVOLUTION IS WAR). By using conflict metaphors to conceptualize his political project, Chávez attributes to his revolution the violent element that it lacks. In addition, the conceptual metaphor “THE BOLIVARIAN REVOLUTION IS WAR” contributes to the polarization of the nation given that opponents are not seen as political adversaries but as war enemies.

The trend identified in the 2001 speech, where Chávez explicitly presented his revolution as the continuation of the early nineteenth-century independence revolution, manifested itself in the period 2002-2004 as well. Again, this suggests that opposing the Revolution is the same thing as opposing the nation (given that Bolívar is the founder of the nation in the collective imaginary of Venezuelans). Also, by presenting his revolution as the continuation of the independence wars of 200 years ago, Chávez provokes the

same erasure effect described in the analysis of the period 1999-2001, making previous governments invisible to his audience.

In the period 2002-2004 the “opposition” target domain not only included “former governments” and “current opponents,” but also a new sub-domain: US imperialism (introduced by Chávez in 2004). In the 2002 and 2003 transcriptions, when US imperialism was not yet part of Chávez’s discourse, conflict metaphors accounted for 35% of all metaphors, morality metaphors accounted for 23%, crime metaphors accounted for 19% and other metaphors accounted for 23%. After the introduction of the US imperialism sub-domain, personifications accounted for 29% and conflict metaphors accounted for 27%.

In the period 2002-2004, all 14 personifications identified (which represent 29% of all metaphors) corresponded to conceptualizations of US imperialism. This reveals a new trend in Chávez’s discursive strategies that started in 2004. This strategy is based on a shift of focus from local opponents to foreign adversaries (represented by US imperialism).

Classifying the 14 personifications by their conceptual metaphors revealed that all of them but two were related to conflict or crime. Therefore, the total percentage of metaphors related to either conflict or crime for the period 1999-2001 was 39%, compared to 59% for the period 2002-2004. This increase suggests the construction of a discourse where opponents were increasingly represented as enemies and criminals.

Finally, Chávez conceptualized opponents as unpatriotic citizens by employing metaphors classified under the target domain “morality.” Also, he portrayed them as allies of US imperialism through personifications and conflict metaphors. These

conceptualizations intensified the polarization, creating a representation of opponents as traitors to their country and enemies of the nation.

Chapter 6: Consolidating the Bolivarian Revolution - Analysis of Data (2005-2007)

This chapter, which presents and analyzes the results of the study from 2005 through 2007, shows that Chávez's primary rhetorical objective during that period was to support discursively the institutionalization of his revolution. For this, Chávez shifted the conceptualization of the Venezuelan nation from "an active agent" to "a mature person," while continuing to represent his revolution as war, and to portray his political opponents as criminals and enemies of the nation. In addition, Chávez introduced in his political discourse the concept of capitalism and conceptualized it as a new threat to his political project. The institutionalization that the president tried to support with his discourse consisted of the introduction and acceptance of "socialism of the twenty-first century" as a viable political system, the creation of the PSUV (*Partido Socialista Unido de Venezuela*), and the approval of constitutional reforms.

After a brief description of the 2005-2007 speeches and their contexts, I provide an overview of the metaphors used by Chávez in those speeches by the three target domains examined in this dissertation. Then, I analyze each of these domains in relation to their source domains in order to show how those metaphors contributed to Chávez's efforts toward consolidating his Bolivarian Revolution.

6.1. Speeches and Their Contexts (2005-2007)

The first transcription examined for this period was not taken from a traditional political speech but from *Aló Presidente*, Chávez's weekly television show. The episode analyzed here was aired by the state television channel on November 27, 2005, and consisted of 48,233 words. It took place one week before the legislative elections, which were boycotted by virtually all of the opposition parties. They withdrew from the elections, alleging lack of transparency in the electoral system. On December 4, 2005,

with an abstention rate of 75%, the government coalition won the legislative elections and obtained 100% of the seats in the National Assembly.

The second speech was given on December 15, 2006 and consisted of 17,221 words. It was aimed at proposing the creation of the PSUV. The speech was held in the Teatro Teresa Carreño in Caracas and aired by the state television channel. It took place two weeks after the presidential elections of December 3, 2006, won by Chávez with 63% of the votes.

In the 2006 speech, Chávez called on his coalition partners into his new single party, the PSUV. He said that this would help him to accelerate the pace of his socialist revolution. Opposition parties reacted with distrust, citing the example of Cuba as a one-party state. Many of Chávez's coalition partners, including the left-wing party Podemos and the Communist Party, have refused to merge into Chávez's single party (Morsbach, "Venezuela head seeks party merger").

The last speech analyzed for this period was given on August 17, 2007, and consisted of 28,356 words. As with the two previous ones, this speech was also aired by the state television channel. In the speech, Chávez presented his constitutional reform to the National Assembly. His proposal emerged after the National Assembly approved an enabling act on January 21, 2007, granting Chávez the power to rule by decree on certain issues for 18 months.

It is worth noticing that in May 2007, approximately two months before the speech, Chávez's government refused to renew the license of the nation's most popular television station, RCTV, alleging that the company had participated in his removal from power in 2002. This has often been identified as a key moment in Chávez's loss of popularity (Petkoff, "Post-Referendum Perspectives"). On December 2, 2007, a

referendum was held to pass constitutional amendments proposed by Chávez and his government. The reforms did not pass, marking a significant defeat for Chávez.

Chávez's proposed changes to 69 articles of the 1999 constitution would have permitted unlimited presidential reelection and increased the president's term from six to seven years. Moreover, they would have given the president control of the country's foreign reserves and the central bank, and the ability to reorganize territorial boundaries in the country. These reforms, which would have also given the president extensive powers in a state of emergency, would have greatly concentrated power in the executive branch (Peregil, "Venezuela dice 'no' a la Constitución de Chávez").

6.2. Overview of Chávez's Metaphors by Target Domain (2005-2007)

This section provides an overview of the metaphors used by Chávez between 2005 and 2007 to conceptualize the three target domains analyzed in this dissertation. Metaphors to conceptualize the nation included those used when referring to the country as well as to its citizens. Metaphors used to conceptualize Chávez's Bolivarian Revolution included those used when referring to his political project and his government's plans, to himself as the leader of his revolution, and to socialism (which did not appear in Chávez's discourse until 2005). Finally, metaphors to conceptualize the political opposition included those used in the analysis of the period 2002-2004 (metaphors referring to former governments, current opponents, and US imperialism), as well as those used to refer to capitalism, which appeared in Chávez's discourse at the same time as socialism in 2005.

A total of 153 metaphors conceptualizing the Venezuelan nation, Chávez's revolution, and Chávez's opposition were identified in the three speeches. This was carried out following the methodology provided by Critical Metaphor Analysis described

in Chapter 2 of this dissertation. Out of the 153 metaphors identified, 23% (35 metaphors) were used to conceptualize the nation, 47% (72 metaphors) were used to conceptualize Chávez's Bolivarian Revolution, and 30% (46 metaphors) were used to conceptualize Chávez's opposition. These findings, summarized in the table below, show the prominent role of Chávez's political project in his discourse for the period 2005-2007. This is consistent with the main premise of this chapter, which assumes that Chávez's primary rhetorical objective during the period 2005-2007 was to support the institutionalization of his Bolivarian Revolution by consolidating the political discourse that he has been constructing since 1999.

Table 1
Number of Metaphors by Target Domain (2005-2007)

| | 2005 | 2006 | 2007 | Total | |
|--------------|-------------|-------------|-------------|--------------|-----|
| Nation | 12 | 9 | 14 | 35 | 23% |
| Revolution | 30 | 27 | 15 | 72 | 47% |
| Opposition | 27 | 6 | 13 | 46 | 30% |
| Total | 69 | 42 | 42 | 153 | |

The 2006 speech showed the highest proportion of metaphors used to conceptualize Chávez's revolution: 64% of all metaphors identified in the speech, compared to 44% for the 2005 *Aló Presidente* and 36% for the 2007 speech. The stronger role of metaphors about Chávez's revolution in the 2006 speech seems to be related to the main objective of the speech: proposing the creation of the PSUV to the coalition of political parties that had been supporting Chávez up to that moment. In the speech, when speaking about the PSUV, Chávez represented it as the next step in the consolidation of his revolution, which in turn he conceptualized as a battle:

[É]sta es una batalla: ¿cuánto terreno hemos conquistado?, ¿cuánto nos falta por conquistar? Y nosotros ahora debemos continuar avanzando en la consolidación de nuestra fuerza política en todo el país, en todo el país.

Given that the intention of the speech was to persuade political partners to merge their parties into the PSUV (an essential part of Chávez's political project), it is not surprising that as much as 64% of the identified metaphors targeted Chávez's Bolivarian Revolution. Chávez's intention to persuade by choosing to employ metaphors that referred to his political project seems consistent with Charteris-Black's argument that the choice of metaphor in political discourse is central to the creation of persuasive belief systems.

The following excerpt from the 2006 speech illustrates the central place attributed by Chávez to his political project in that particular speech. Again, he conceptualized his project as a battle:

[S]e trata de levantar, bueno, y dar la batalla de las ideas, ya no es la batalla electoral, seguramente tendremos que darla en los próximos años, pero en este momento hay que levantar la batalla de las ideas, el proyecto socialista, y para eso ustedes, todos, debemos estudiar mucho, estudiar mucho, leer mucho, discutir mucho, hacer mesas redondas, mesas cuadradas, reuniones de la escuadra, del pelotón socialista.

The high proportion of metaphors used to conceptualize Chávez's Bolivarian Revolution in the 2006 speech occurred at the expense of those that conceptualized the opposition. While metaphors conceptualizing the opposition represented 39% of all metaphors in the 2005 *Aló Presidente* and 30% in the 2007 speech, they only accounted for 14% in the 2006 speech. This low proportion could be attributed to the fact that the

speech was made at a moment when the opposition was perceived as less of a threat, two weeks after Chávez won the presidential elections with 63% of the votes.

The breakdown of the target domain “Chávez’s Bolivarian Revolution,” which consists of the sub-domains “Revolution,” “Socialism,” and “Chávez,” shows that “Socialism” went from 6 metaphors (20% of all metaphors) in the 2005 *Aló Presidente*, to 13 metaphors (48%) in the 2006 speech, to 6 metaphors (40%) in the 2007 speech. The fact that almost half of all metaphors in the 2006 speech conceptualized socialism can be attributed to the fact that the objective of the speech was to obtain support for the PSUV.

Table 2 illustrates this breakdown.

Table 2
Number of Metaphors with Target Domain “Chávez’s Bolivarian Revolution” (2005-2007)

| | 2005 | 2006 | 2007 | Total |
|------------|-------------|-------------|-------------|--------------|
| Revolution | 23 | 14 | 8 | 45 |
| Socialism | 6 | 13 | 6 | 25 |
| Chávez | 1 | 0 | 1 | 2 |
| Total | 30 | 27 | 15 | 72 |

Out of the 46 metaphors employed by Chávez to conceptualize the opposition, 40% (17 out of 46) referred to US imperialism, 24% (11 out of 46) to former governments, 22% (10 out of 46) to current opposition, and 14% (7 out of 46) to capitalism. It is interesting to note that the proportion of metaphors used to conceptualize Chávez’s opposition reached its lowest level of the period in 2006, representing only 14% of all metaphors (6 out of 42). This may also be related to the main objective of the speech (Chávez’s proposal to create the PSUV), which was an internal matter associated with the coalition of political parties that had been supporting Chávez up to that moment. Table 3 shows the breakdown of this target domain for the period 2005-2007.

Table 3
Number of Metaphors with Target Domain “Opposition” (2005-2007)

| | 2005 | 2006 | 2007 | Total |
|--------------------|-----------|----------|-----------|-----------|
| Former Governments | 6 | 1 | 4 | 11 |
| Current Opposition | 5 | 2 | 2 | 9 |
| US Imperialism | 11 | 1 | 7 | 19 |
| Capitalism | 5 | 2 | 0 | 7 |
| Total | 27 | 6 | 13 | 46 |

Former governments represented 24% (11 out of 46) of all metaphors targeting the opposition in the period 2005-2007. This suggests a change in Chávez’s discursive strategies from the previous period (2002-2004), when former governments only represented 2% of all metaphors about the opposition.

It is curious to note that in the 2007 speech, nine years after Chávez’s arrival to power, the president kept employing metaphors about former governments (30%, or 4 out of 13). Some of his metaphors about former governments from the 2007 speech included: “ellos no tienen moral, porque entregaron este país y más nunca volverán a gobernar nuestro país, más nunca volverán,” “hemos recibido un país destrozado por los cuatro costados,” and “hemos roto las cadenas que subordinaban a esa sociedad política a la sociedad civil oligárquica burguesa del pasado, y eso ya sólo genera un cisma, pero no es suficiente.”

Finally, while US imperialism (introduced in 2004) accounted for 35% of all metaphors conceptualizing the opposition for the period 2002-2004, they represented 41% in the period 2005-2007. Nevertheless, the 2004 speech remains the text in this corpus with the highest proportion of metaphors targeting US imperialism (74% of all

metaphors used to conceptualize the opposition). In 2005, the sub-domain “capitalism” appeared for the first time, accounting for 18% (5 out of 27) of all metaphors about the opposition in the 2005 *Aló Presidente*, and for 33% (2 out of 6) in the 2006 speech. Chávez did not use any metaphor in the 2007 speech to conceptualize capitalism.

6.3. Source Domains in Chávez’s Metaphors (2005-2007)

As for the periods 1999-2001 and 2002-2004, all 153 metaphors were classified according to their source domains and conceptual metaphors were identified for each of them. This was carried out following the methodology provided by Critical Metaphor Analysis and by cognitive linguistics described in Chapter 2 of this dissertation.

The most frequent source domains were personification and conflict, which were also the most frequent ones in the periods 1999-2001 and 2002-2004. Other frequent source domains included construction, journey and morality.

Personifications accounted for 33% (51 metaphors) of all metaphors. It is interesting to note that the analysis of the periods 1999-2001 and 2002-2004 revealed very similar findings, with personifications accounting for 28% and 30% of all metaphors respectively. Thus, approximately one third of all metaphors analyzed in this study represent personifications. Table 4 illustrates the number of metaphors by source domain for the period 2005-2007:

Table 4
Number of Metaphors by Source Domain (2005-2007)

| | 2005 | 2006 | 2007 | Total | |
|-----------------|-------------|-------------|-------------|--------------|-----|
| Personification | 28 | 5 | 18 | 51 | 33% |
| Conflict | 8 | 9 | 4 | 21 | 14% |
| Construction | 1 | 9 | 6 | 16 | 11% |
| Journey | 7 | 4 | 2 | 13 | 8% |
| Morality | 5 | 5 | 2 | 12 | 8% |
| Nature | 4 | 1 | 3 | 8 | 5% |
| Family | 2 | 3 | 1 | 6 | 4% |
| Life/Death | 0 | 3 | 3 | 6 | 4% |
| Crime | 4 | 0 | 1 | 5 | 3% |
| Slavery | 3 | 0 | 1 | 4 | 3% |
| Others | 7 | 3 | 1 | 11 | 7% |
| Total | 69 | 42 | 42 | 153 | |

The breakdown of Chávez's personification metaphors by target domain for the period analyzed reveals that 26 out of the 51 metaphors found (or approximately 51%) were used to describe the nation, a total of 15 metaphors (or approximately 29%) were used to describe US imperialism, and 8 (or approximately 16%) were used to describe Chávez's revolution. As in the periods 1999-2001 and 2002-2004, the most frequent target domain described through personification was the nation. However, in the period 1999-2001 the nation accounted for 82% of all metaphors, whereas in the periods 2002-2004 and 2005-2007 it represented 45% and 51% respectively. Table 5 summarizes the number of personification metaphors by target domain for the period 2005-2007.

Table 5
Number of Personification Metaphors by Target Domain (2005-2007)

| | 2005 | 2006 | 2007 | Total | |
|-----------------------------|-------------|-------------|-------------|--------------|-----|
| Nation | 11 | 4 | 11 | 26 | 51% |
| Revolution | 8 | 0 | 0 | 8 | 16% |
| Opposition (Imperialism) | 9 | 1 | 7 | 17 | 33% |
| Total | 28 | 5 | 18 | 51 | |

6.4. Conceptualizing the Nation

6.4.1. Reconceptualizing the Nation: From “Active Agent” to “Mature Person”

The analysis of Chávez’s metaphors to describe the nation for the period 2005-2007 shows that most of his metaphors (74%) were personifications. Other metaphors used by the president included family (11%) and construction metaphors (6%). These findings are illustrated in the following table:

Table 6
Number and Types of Metaphors for the Target Domain “Nation” (2005-2007)

| | 2005 | 2006 | 2007 | Total | |
|-----------------|----------|-----------|-----------|-----------|-----|
| Personification | 11 | 4 | 11 | 26 | 74% |
| Family | 0 | 3 | 1 | 4 | 11% |
| Construction | 1 | 0 | 1 | 2 | 6% |
| Others | 0 | 2 | 1 | 3 | 9% |
| Total | 9 | 14 | 10 | 33 | |

The proportion of personifications used to describe the nation increased from 17% (12 out of 69) in 2005, to 21% (9 out of 42) in 2006, to 33% (14 out of 42) in 2007. In the three-year period, personifications were used by Chávez to conceptualize the nation as a mature person, capable of assuming the new challenges that the introduction of the *Socialismo del siglo XXI* and the creation of the PSUV entailed. Thus, Chávez’s conceptualization of the nation shifted from an “active agent” to a “mature person.” The conceptual metaphor that describes the new role of the country in Chávez’s discourse is THE NATION IS A MATURE PERSON.

The emergence of the “mature person” conceptualization, which showed in the corpus for the first time in the 2005 *Aló Presidente*, is probably linked to the appearance of the socialist doctrine in Chávez’s discourse at the World Social Forum in Porto Alegre, ten months prior to the *Aló Presidente*. Before this speech at the World Social Forum,

Chávez had never spoken publicly about his sympathy for socialism. The Porto Alegre speech marked the beginning of a new era in Chávez's Bolivarian Revolution. Thus, on January 30, 2005, from the *Gimnasio Gigantinho*, in front of thousands of people, Chávez said:

Negar los derechos a los pueblos es el camino al salvajismo, el capitalismo es salvajismo [...] Es necesario, decimos y dicen muchos intelectuales del mundo, trascender el capitalismo, pero agregó yo, el capitalismo no se va a trascender por dentro del mismo capitalismo, no. Al capitalismo hay que trascenderlo por la vía del socialismo, por esa vía es que hay que trascender el modelo capitalista, el verdadero socialismo. ¡La igualdad, la justicia!

The new era announced in Porto Alegre ten months earlier was confirmed in the 2005 *Aló Presidente*, when Chávez announced the beginning of a transformation in the economic model of the country, which he called “la esencia del proyecto de la Revolución Bolivariana.” Chávez said:

[T]enemos y vamos a mostrar hoy una exposición de empresas que están entrando en el camino de la transformación del modelo productivo venezolano a través de la figura de las Empresas de Producción Social y las Unidades de Producción Comunitarias. Pasos estratégicos importantísimos en la transformación, repito, del modelo económico, del modelo productivo que es esencia del proyecto de la Revolución Bolivariana, la revolución democrática, la democracia revolucionaria rumbo al socialismo del siglo XXI, el socialismo bolivariano, el socialismo nuestro, el socialismo que requerimos para que haya justicia,

para que haya libertad, para que haya igualdad y para que haya paz plena en nuestro país.

The conceptualization THE NATION IS A MATURE PERSON is based on representations of the nation such as a “trustworthy person,” an “organized and conscious person,” and “a wise person.” For instance, in the 2005 *Aló Presidente* Chávez said: “Ahora el Estado, a través la nueva PDVSA, confía en ellos, que son el pueblo —el pueblo es todo el país, pues, la nación,” “Es el pueblo consciente, organizado,” “¡menos mal que tenemos un pueblo que es sabio!” and “el país lo sabe, tú lo sabes, contamos con la Guardia Nacional.”

The role of “mature person” assigned by Chávez to the nation also appeared in the 2006 and 2007 speeches. Some examples of this metaphor included: “un pueblo que ahí está demostrando solidez ideológica, demostrando madurez política, demostrando coraje a prueba de todo. Con ese pueblo siempre; sin ese pueblo nunca” “Así que vengan las batallas que tengan que venir, las enfrentaremos, las libraremos con altura, con grandeza del pueblo digno de Simón Bolívar, y ofrendaremos a la Patria nuestras victorias,” “el país todo lo sabe antes, para que nadie venga a acusarme a mí de que sorprendí al país con una propuesta debajo de la manga,” and “Un pueblo que dijo ‘basta’.” In these cases, the conceptualization THE NATION IS A MATURE PERSON is based on representations of the nation such as a “wise and courageous person,” an “organized and conscious person,” “a knowledgeable person,” and a “decisive person.”

6.4.2. Other Conceptualizations of the Nation and “The Nation is Chávez”

Family and construction metaphors were also used by Chávez to conceptualize the nation. Family metaphors mainly included conceptualizations of “the nation as a mother.” For instance, in 2006, Chávez said “por el tremendo esfuerzo que se hizo, que ustedes hicieron a lo largo y ancho de la madre Patria, de la tierra, de la tierra venezolana,” “Bolívar, uno de los más grandes sabios que parió esta tierra, que ha parido esta tierra,” and “Antonio José de Sucre, otro de los más grandes hombres que parió esta tierra.”

In his book *Moral Politics*, Lakoff argues that family metaphors are powerful in politics because they allow us “to reason about the nation on the basis of what we know about the family” (155). In Lakoff’s argument, both Democrats and Republicans in the United States conceptualize the nation as a family. The difference between them is that Democrats conceptualize their governments as “nurturing mothers,” while Republicans conceptualize theirs as “strict fathers.”

According to the findings of this study, family metaphors do not seem to be as prominent in Chávez’s discourse as they are in US politics. However, based on the analysis of the 2006 speech described above, “the mother” in Chávez’s family metaphors seems to be the nation itself and not the government. Also, based on the only family metaphor found in the 2005 *Aló Presidente* to conceptualize his government, it seems that Chávez represents his government more as a “strict father” rather than as a “nurturing mother.” While addressing a worker from “Núcleo Endógeno Fabricio Ojeda,” one of the community centers sponsored by his government to promote employment, Chávez said: “te lo digo con todo cariño pero con toda crudeza: no se malacostumbren a que todo tiene que venir del papá Gobierno ‘a darme la maquinita que me falta.’”

The conceptualization THE PEOPLE (or THE NATION) IS CHÁVEZ, found in the periods 1999-2001 and 2002-2004, also appeared in the period 2005-2007. Thus, in the 2006 speech, when speaking about his victory in the elections of December 3, 2006, Chávez said:

[E]n el 63 por ciento de todos los centros de votación Chávez obtiene, es decir el pueblo obtiene, nosotros obtenemos, más del 57 por ciento de los votos emitidos en ese centro.

In the 2007 speech, when presenting his constitutional reform to the National Assembly, Chávez said “la reforma es del pueblo, no es de Chávez.” By conceptualizing his reform as the people’s reform, Chávez is conceptualizing the people as himself (THE PEOPLE IS CHÁVEZ). This is based on the fact that in reality he was the sole author of the proposed constitutional reform, the one who conceived it, wrote it and presented it to the National Assembly. His authorship is confirmed by the way he introduced each of the changes in the speech. For instance, he presented the first change as follows: “El primer artículo que propongo modestamente reformar, y así lo digo aquí, propongo al pueblo soberano modificar el artículo 11.” Chávez used *propongo* 31 times and *estoy proponiendo* 2 times.

In terms of construction metaphors, Chávez represented the nation with the conceptual metaphor THE NATION IS A BUILDING. For instance, in 2005 he said: “Porque todo esto podemos fabricarlo en Venezuela, desarrollando aguas abajo, la materia prima, los minerales, el acero, el hierro, el aluminio, las aleaciones, la madera, el plástico. Así se construye un país.” Similarly, before presenting his constitutional reform to the National Assembly in 2007, Chávez said: “He hecho un esfuerzo de síntesis para apuntar allí a los puntos nodales, críticos, que considero deben

ser reformados para abrir otra etapa en este proceso de construcción de la Venezuela bolivariana y socialista.”

As in the period 2002-2004, THE NATION IS A BUILDING contributes to solidify Chávez’s position vis-à-vis the opposition. This is due to the fact that, as seen in the analysis of previous periods, both parties are at war (THE BOLIVARIAN REVOLUTION IS WAR), but one (*chavismo*) is conceptualized as a strong building, while the other (the opposition) is not. The following section expands the analysis of the conceptual metaphor THE BOLIVARIAN REVOLUTION IS WAR.

6.5. Maintaining the Conceptualization of the Bolivarian Revolution as War

As was the case in the periods 1999-2001 and 2002-2004, the analysis of metaphors used by Chávez to conceptualize his Bolivarian Revolution between 2005 and 2007 shows that conflict metaphors were the most frequent types of metaphors, accounting for 24% of all metaphors. Although this represents a decrease of 19% from the period 2002-2004, it only represents a decrease of 4% from the period 1999-2001. Conflict metaphors were followed by construction (19%) and journey (18%) metaphors.

Table 7 illustrates these findings:

Table 7
Number of Metaphors by Source Domain for “Chávez’s Bolivarian Revolution” (2005-2007)

| | 2005 | 2006 | 2007 | Total | |
|-----------------|-----------|-----------|-----------|-----------|-----|
| Conflict | 7 | 8 | 2 | 17 | 24% |
| Construction | 0 | 9 | 5 | 14 | 19% |
| Journey | 7 | 4 | 2 | 13 | 18% |
| Personification | 8 | 0 | 0 | 8 | 11% |
| Nature | 1 | 1 | 2 | 4 | 6% |
| Life/Death | 0 | 0 | 3 | 3 | 4% |
| Religión | 1 | 2 | 0 | 3 | 4% |
| Others | 6 | 3 | 1 | 10 | 14% |
| Total | 30 | 27 | 15 | 72 | |

As was the case for the periods 1999-2001 and 2002-2004, Chávez conceptualized his Bolivarian Revolution as war in all 17 conflict metaphors for the 2005-2007 period. That is to say, the conceptual metaphor THE BOLIVARIAN REVOLUTION IS WAR was underneath each and every one of the cases.

It is interesting to note that although, overall, conflict metaphors were the most frequent types of metaphors used by Chávez to conceptualize his revolution during the 2005-2007 period, they were not the most frequent types of metaphors in any of the speeches individually. Thus, in the 2005 *Aló Presidente*, personifications represented 27% of all metaphors about Chávez's Bolivarian Revolution for that year (8 out of 30) while conflict metaphors accounted for 23% (7 out of 30). In the 2006 speech, conflict metaphors represented 30% (8 out of 27) and construction metaphors accounted for 33% (9 out of 27). Finally, in the 2007 speech conflict metaphors only represented 13% of all metaphors (2 out of 15), while construction metaphors accounted for 33% (5 out of 15).

The fact that conflict metaphors only represented 13% of all metaphors conceptualizing Chávez's revolution in the 2007 speech may have been due to the purpose of the speech (to persuade Venezuelans to accept his proposal for constitution reform). It seems unlikely that this low proportion represents a reversal of the trend observed in the other speeches of the study, namely that conflict metaphors have maintained an essential role in conceptualizing Chávez's Bolivarian Revolution since 1999.

The aim of the 2007 speech was to persuade members of the National Assembly in particular, and the people of Venezuela in general, that his proposal to reform the 1999 Constitution was viable and deserved to be submitted to a national referendum. Therefore, the president opted for employing metaphors that would conceptualize his

project as a “building being constructed” rather than as a “war being fought.” War metaphors at that crucial moment of much-needed popular support would have probably been counterproductive given the polarizing effect that they had had in previous years. In addition, Chávez’s popularity had decreased during 2007, especially after forcing RCTV (the most popular television channel) to stop broadcasting by not renewing their license to broadcast.

The only two conflict metaphors employed by Chávez to conceptualize his revolution in the 2007 speech suggest some awareness on his part that he had adopted a “conciliatory tone” to refer to this Bolivarian Revolution (constructing something together), rather than the usual “confrontational tone” (through which his project has been conceptualized as war). Thus, Chávez first said:

[E]n fin, esta modesta propuesta lleva, eso sí, la gran esperanza de que a partir de hoy se convierta en bandera de batalla.

Similarly, he said:

[U]na revolución pacífica, democrática, pero armada, que a nadie se le olvide. Esta revolución no es como aquel profeta desarmado de la Florencia de los Médicis que terminó colgado en un farol, Jerónimo Savonarola. Esta revolución es y está armada, que a nadie se le olvide.

Those two conceptualizations are different from the conflict conceptualizations that he usually employs to represent his revolution. Some examples of his regular conflict conceptualizations can be found in the 2005 *Aló Presidente*: “Así como estamos liberando la Patria, estamos liberándola también por supuesto desde abajo,” and “proyecto socialista nuevo, fresco, distinto, democrático. Es decir, tenemos que liberarnos del dominio de los grandes capitalistas, del monopolio.” Similarly, in the 2006 speech he

said: “igual digo yo, el camino que viene estará lleno de batalla, pero igual, a cada batalla obtendremos el trofeo de la Victoria,” “estoy seguro que obtendremos nutrientes de gran potencial para esta nueva batalla que ya comenzó, ya comenzó la nueva batalla” and “batallar para reconquistar y conquistar la que hemos perdido y la que no hemos ganado todavía. Es decir, continuar fortaleciendo nuestro poder político, nuestro poder moral, nuestro proyecto revolucionario.”

Finally, it is interesting to note that in his book El poder político en Venezuela, Ramón Guillermo Avelledo interprets Chávez’s statement of “[U]na revolución pacífica, democrática, pero armada” as a new version of Bolívar’s “Decreto de Guerra a Muerte (issued by Bolívar as a response to the crimes committed by the Spanish army).³⁴

Avelledo says:

El Decreto de Guerra a Muerte tiene su versión contemporánea en una idea de Venezuela que no contemporiza con “el enemigo”. La concepción bélica de la política reclama victorias totales. “Esta es una revolución pacífica, pero armada” repite el Presidente, mientras la práctica traduce “pacífico” como el comportamiento del poder mientras nadie se oponga a sus designios.

6.5.1. The Bolivarian Revolution as the Continuation of Bolívar’s Independence Wars

As mentioned in chapter 4 and 5, CMA was not used to identify representations of Chávez’s political project as the continuation of Bolívar’s independence wars. Instead, the identification involved finding passages in which this representation was made in an

³⁴ The “Decreto de Guerra a Muerte” was given by Bolívar in June 1813: “Españoles y Canarios: Contad con la muerte, aún siendo indiferentes, si no obráis activamente en obsequio de la libertad de la América. Americanos, contad con la vida aún cuando seáis culpables.”

explicit manner. Thus, the trend observed in previous periods manifested itself in the period 2005-2007 as well. For instance, in the 2005 *Aló Presidente*, when speaking about the events of the second coup d'état of 1992, carried out by his comrades, Chávez said:

Quiero rendir tributo desde aquí a mis compañeros de armas que el 27 de noviembre de 1992 surcaron los cielos patrios, recorrieron campos, pueblos y ciudades dándose un abrazo con el pueblo venezolano [...] De manera muy especial saludo al señor comandante Luis Reyes Reyes, uno de los líderes militares de aquella jornada, hoy gobernador del estado Lara. Aquel día memorable el comandante Reyes Reyes recordemos que cruzó los cielos de Caracas en un F-16 rompiendo la barrera del sonido. Yo no lo vi ni lo oí pues estábamos en Yare, pero me lo contaron de mil maneras. Cuando Reyes Reyes rompió la barrera del sonido estaba diciéndole a la historia venezolana que estábamos también rompiendo definitivamente con el pasado y abriendo un camino hacia el sueño de Bolívar, hacia el sueño de la Patria justa, de la Patria libre, de la Patria grande.

The 2005 *Aló Presidente* is particularly significant in illustrating Chávez's intention to represent his political project as the continuation of Bolívar's independence wars. In that episode he went beyond discourse and announced his decision to change two of the most important symbols of the Venezuelan nation: the flag and the coat of arms.

After providing a long historical account of the evolution of the Venezuelan flag and the coat of arms, Chávez concluded that they needed to be changed back to what they were when Bolívar was alive. The conceptualization CHÁVEZ'S POLITICAL PROJECT IS BOLÍVAR'S PROJECT is underneath this symbolic but meaningful

gesture. This is interesting as it shows that political actions and policies can also be described in terms of conceptual metaphors.

Thus, in the 2005 *Aló Presidente*, Chávez proposed to add an additional star to the existing seven stars that the flag had in 2005. Chávez argued that Bolívar intended for the flag to have eight stars and not seven. To support his argument, he read a decree signed by Simón Bolívar on November 20, 1817:

Aquí está, miren: “Simón Bolívar, Jefe Supremo. Decreto del 20 de noviembre de 1817”. “Habiéndose aumentado el número de provincias — estoy leyendo— que comparten la República de Venezuela por la incorporación de la Guayana, decretada el 15 de octubre último, he decretado y decreto: Artículo Único: A las 7 estrellas que lleva la Bandera nacional de Venezuela, se añadirá una como emblema de la Provincia de Guayana. De modo que el número de las estrellas serán en adelante, de 8. Dado, firmado de mi mano, sellado con el sello provisional del Estado y refrendado por el Secretario del Despacho, en el Palacio de Gobierno de la ciudad de Angostura, el 20 de noviembre de 1817. Simón Bolívar. Jefe Supremo de la República”. Aquí me baso para decir lo que propongo al país, y eso le correspondería a la Asamblea Nacional, no a mí. Es una propuesta que hago para que se decrete la octava estrella en la Bandera Nacional. Es la estrella de Bolívar. Es la estrella del Libertador.

To introduce his proposal to turn around the horse from the Venezuelan coat of arms so that instead of looking to the right it would be looking to the left, Chávez started by telling an anecdote about his daughter Rosinés:

Lo del Escudo es mucho más interesante por lo que he dicho en Angostura. Y aquí es cuando entra en el juego mi hija, la más chiquita, la Rosinés ¿Ve? A lo mejor es que ella me oyó hablar alguna vez de esto, pero es que una vez estábamos dibujando un caballo y agarramos el caballo del Escudo para dibujarlo. Entonces ella de repente me dice: “Papi, ese caballo si está raro, es decir, ¿cómo es que el caballo va para acá pero mira para atrás?” Bueno, una pregunta de una niña. Yo no le respondí gran cosa. Dibujamos el caballo. Ahora, yo sí estaba seguro de que revisando la historia conseguiríamos cosas curiosas sobre el caballo.

Then, Chávez explained that those responsible for turning around the horse were Bolívar’s enemies, and supported his argument as follows:

Entonces, en el Escudo de 1836 aparece el caballo con el cuello invertido. Estamos hablando de 1836, el caballo de la Gran Colombia lo invierten. Ahora, es el caballo antibolivariano. El caballo de la Gran Colombia, el que va cabalgando a la izquierda, libre, es el caballo bolivariano; el otro es el antibolivariano, es el caballo de la Cuarta República, es el caballo que se devuelve. “Chivo que se devuelve se esnuca [*sic*]”. Es un caballo que se devuelve, es un caballo no indómito.

In the end, the National Assembly passed Chávez proposal and both the flag and the coat of arms were changed to reflect the president’s suggestions. In March 2006, Chávez officially presented the new flag and coat of arms in a military parade (BBC Mundo, “Venezuela estrena bandera”).

Other examples of Chávez’s trend to conceptualize the Bolivarian Revolution as the continuation of Bolívar’s independence wars can be found in the 2006 and 2007

speeches. Thus, in the 2006 speech, when defining socialism, Chávez said: “[el socialismo es] la recuperación plena de la patria, de la grandeza del proyecto de Bolívar.” He also said “Bolívar nunca murió, Bolívar está vivo en nosotros y a ha vuelto con una fuerza infinita.”

Although in the 2007 speech Chávez did not employ metaphors to conceptualize his Bolivarian Revolution as the continuation of Bolívar’s independence wars, he did employ some similes with the same goal: “[Bolívar] gritó “¡Libertad o Muerte! Que es lo mismo que decir ¡Patria o Muerte!” and “sigamos pues en el empeño de despejar la misteriosa incógnita y de construir un país, como decía el mismo Bolívar, donde los hombres y las mujeres seamos honrados y felices.”

Finally, it is worth citing a passage from the 2007 speech, where Chávez clearly attempted to bring together his revolution and Bolívar’s independence efforts. It is interesting to note that in addition to metaphors, Chávez also employed other figures of speech, such as anaphora and similes, in an attempt to establish the relation between his revolution and Bolívar’s independence efforts. This illustrates one of Charteris-Black’s main points: “metaphors do not work in isolation from other rhetorical strategies” (Charteris-Black, *Politicians and Rhetoric* 30):

Ahora sí, 7, 8 años después, ahora sí, con el rumbo bien claro; ahora sí, con el conocimiento mucho más profundo de nuestras realidades; ahora sí, con una experiencia que se va sumando a la pasión y a la voluntad; ahora sí, con rumbo hacia el socialismo, hacia una democracia profunda y plena, como Bolívar lo dijo o lo quiso decir seguramente hace 202 años, cuando hablaba de la misteriosa incógnita del hombre en libertad; el hombre, el ser humano en libertad; en libertad de la miseria, en libertad de la

explotación, en libertad de la discriminación, en libertad del atraso, para que podemos volar y construir, como dijo Bolívar, en este lugar del mundo, la más grande nación del universo menos por su extensión y sus riquezas, que por su libertad y su gloria.

6.5.2. Other Conceptualizations of Chávez’s Bolivarian Revolution: Construction and Journey Metaphors

As mentioned before, construction and journey metaphors were also used by Chávez to conceptualize his revolution. Some construction metaphors that appeared during the 2005-2007 period included: “vamos hasta las comunidades indígenas para ayudarlos, más bien vamos a pedirle ayuda a ellos para que cooperen con nosotros en la construcción del proyecto socialista originario,” “porque en esos años de la construcción del movimiento bolivariano, el MBR-200, en esos años entonces uno tenía que reunirse con un movimiento político por aquí y el otro por allá,” and “es una responsabilidad suprema la construcción del Socialismo Bolivariano.”

Some journey metaphors included: “vamos rumbo al socialismo, yo jamás he engañado a nadie, yo no ando con cuenticos por aquí escondido,” “la política, la política desde este punto de vista debe definir qué es lo que queremos, hacía dónde es que vamos,” and “Ahora sí, 7, 8 años después, ahora sí, con el rumbo bien claro.”

6.6. Maintaining the Trend to Conceptualize Opponents as Combatants and Criminals

In addition to the three sub-domains used to conceptualize the opposition in 2002-2004 (former governments, current opponents, and US imperialism), the 2005-2007 period also included the sub-domain “capitalism.” This sub-domain emerged in 2005 at the same time as the sub-domain “socialism.” Chávez introduced capitalism in his

discourse in opposition to socialism. In general terms, he conceptualized it as a new threat to his political project.

Between 2005 and 2007, personifications accounted for 37% of all metaphors related to the target domain “opposition,” morality metaphors accounted for 17%, crime metaphors accounted for 11% and other metaphors accounted for 35%. Table 8 illustrates the number of metaphors by source domain for the target domain “opposition.”

Table 8
Number of Metaphors by Source Domain for “Opposition” (2005-2007)

| | 2005 | 2006 | 2007 | Total | |
|------------------|-------------|-------------|-------------|--------------|-----|
| Personifications | 9 | 1 | 7 | 17 | 37% |
| Morality | 4 | 3 | 1 | 8 | 17% |
| Crime | 4 | 0 | 1 | 5 | 11% |
| Slavery | 3 | 0 | 1 | 4 | 9% |
| Conflict | 1 | 0 | 2 | 3 | 6% |
| Nature | 3 | 0 | 0 | 3 | 6% |
| Destruction | 1 | 0 | 1 | 2 | 5% |
| Others | 2 | 2 | 0 | 4 | 9% |
| Total | 27 | 6 | 13 | 46 | |

As previously indicated, 40% (17 out of 46) of all metaphors employed by Chávez to conceptualize the opposition referred to the domains "US imperialism," 24% (11 out of 46) to "former governments," 22% (10 out of 46) to "current opposition," and 14% (7 out of 46) to "capitalism." As was the case in the speeches for the period 2002-2004, Chávez mainly conceptualized US imperialism in this period's speeches by using personifications (88%, or 15 out of 17). All 17 personifications identified (which represent 37% of all metaphors) corresponded to conceptualizations of US imperialism.

If we classify the 15 personifications by their conceptual metaphors, we realize that all of them are related to either conflict or crime. Table 9 below shows these findings:

Table 9
Number of Personifications of US Imperialism by Conceptual Metaphor
(2005-2007)

| Conceptual Metaphor | Sub-domain | Number |
|-------------------------------------|-------------------|---------------|
| IMPERIALISM IS A CRUEL COMBATANT | Conflict | 4 |
| IMPERIALISM IS A THIEF | Crime | 3 |
| IMPERIALISM IS A VIOLENT INVADER | Conflict | 2 |
| IMPERIALISM IS A DISHONEST PERSON | Crime | 2 |
| IMPERIALISM IS A DESTRUCTIVE PERSON | Crime | 2 |
| IMPERIALISM IS A USURPER | Crime | 1 |
| IMPERIALISM IS A CRIMINAL | Crime | 1 |
| | | 15 |

If we add the 15 metaphors identified above to the conflict and crime metaphors in Table 6, we can conclude that in the 2005-2007 period a total of 9 metaphors were related to conflict and 14 metaphors to crime. This means that 23 metaphors, or 50% of all metaphors, were related to either conflict or crime. The percentages of metaphors about the opposition related to either conflict or crime were 39% for the period 1999-2001 and 59% for the period 2002-2004.

6.6.1. Other Conceptualizations of Opponents as Criminals

If we look at the three slavery metaphors identified in the analysis of the period 2005-2007, we notice that two of them portrait capitalism as a “tool for exploitation” and one portraits former governments as “exploiters.” As slavery is a serious human rights violation, we can also count those metaphors as being related to crime or conflict. Thus, as much as 27 out of the 46 metaphors used by Chávez to conceptualize his opponents were related to conflict or crime. This represents 59% of all metaphors about the opposition. Therefore, we can conclude that in the period 2005-2007 opponents continued to be conceptualized largely in terms of conflict and crime.

Some conceptual metaphors targeting the opposition with crime or conflict source domains included: in 2005, *FORMER GOVERNMENTS WERE EXPLOITERS* (“[los gobiernos de antes] les daban el crédito y ya les descontaban por adelantado los intereses, que eran como de 70%. ¡Después no les alcanzaba ni para comer! Era la explotación”), and *CAPITALISM IS A TOOL OF EXPLOITATION* (“Lo malo es el capitalismo, que es la degeneración del uso del capital, cuando el capital se concentra en pocas manos y es utilizado para explotar a los demás”); in 2006, *IMPERIALISM/CAPITALISM IS A VIOLENT PERSON* (“llegó allá un día a conocer aquellas comunidades nuestra, Yaruras, Cuibas, tan golpeadas por la historia, por el capitalismo y por el imperialismo”); and in 2007, *THE OPPOSITION/IMPERIALISM IS A COMBATANT* (“podremos derrotar la fuerza del imperialismo y de la oligarquía lacaya que aquí pervive desde siempre”).

6.6.2. Continuing to Conceptualize Opponents as Unpatriotic Citizens Allied with US Imperialism

As was the case in the period 2002-2004, the analysis of metaphors classified under the target domain “morality” for the period 2005-2007 reveals Chávez’s efforts to continue representing opponents as unpatriotic citizens lacking ethical and moral values (*OPPONENTS ARE UNPATRIOTIC CITIZENS*). The 2005 *Aló Presidente*, in which Chávez announced his proposal to change the flag and the coat of arms, includes several examples. For instance, “¡las campanas doblaban por el Pacto de Punto Fijo que traicionó la esperanza de este pueblo, que traicionó el espíritu del 23 de enero y le entregó el país al imperialismo y a la élite nacional!,” “Y ahora, como a algunos voceros de la oligarquía apátrida veo que les ha dolido, entonces es que ahora voy duro, rumbo a la octava estrella en la bandera nacional de Venezuela,” and “Ahora, que algunos lo tomen por allí, y ellos

sin sentimiento patrio de ningún tipo se irrespetan a sí mismos y a la nación toda haciendo chistes, payasadas, allá ellos.”

Similarly, in 2006 he said “a Bolívar lo transformaron, muchos escritos de Bolívar no se conocieron nunca, es ahora cuando se están conociendo.” In this example, by portraying opponents as manipulators of Bolívar’s history, Chávez is conceptualizing them as unpatriotic citizens. Finally, in the 2007 speech, the president said “ellos no tienen moral, porque entregaron este país y más nunca volverán a gobernar nuestro país, más nunca volverán.”

All the examples above illustrate Chávez’s attempts to conceptualize his opponents as enemies of the nation. This is a trend that has been observed since 2002 in all the speeches examined in this study, either directly (by calling them “apátridas” as shown above) or indirectly (through specific conceptualizations).

6.7. Summary of Results for the Period 2005-2007

The analysis of metaphors for the period 2005-2007 indicates that Chávez’s primary rhetorical objective was to support discursively the institutionalization of his revolution. For this, Chávez shifted the conceptualization of the Venezuelan nation from “an active agent” to “a mature person,” while continuing to represent his revolution as war and to portray his political opponents as criminals and enemies of the nation. In addition, Chávez introduced in his discourse the concept of capitalism and conceptualized it as a new threat to his political project. The institutionalization that the president tried to support with his discourse consisted of the introduction and acceptance of “socialism of the twenty-first century” as a viable political system, the creation of the PSUV (*Partido Socialista Unido de Venezuela*), and the approval of constitutional reforms.

Out of the 153 metaphors identified, 23% were used to conceptualize the nation, 47% were used to conceptualize Chávez's Bolivarian Revolution, and 30% were used to conceptualize Chávez's opposition. These findings show the prominent role of Chávez's political project in his discourse for the period 2005-2007.

Personification was the most common type of metaphor in Chávez's discourse for the period 2005-2007, accounting for 33% of all metaphors. It is interesting to note that the analysis of the periods 1999-2001 and 2002-2004 revealed very similar findings in terms of personifications, which accounted for 28% and 30% of all metaphors in the first and second periods respectively. Thus, approximately one-third of all metaphors analyzed in this study represent personifications.

As in the periods 1999-2001 and 2002-2004, the most frequent target domain described through personification was the nation. However, in the period 1999-2001 the nation accounted for 82% of all metaphors, whereas in the periods 2002-2004 and 2005-2007 they represented 45% and 51% respectively.

The analysis of Chávez's metaphors to describe the nation for the period 2005-2007 shows that most of his metaphors (74%) were personifications. Other metaphors used by the president included family (11%) and construction metaphors (6%). The proportion of personifications used to describe the nation increased from 17% in 2005, to 21% in 2006, to 33% in 2007. In the three-year period, personifications were used by Chávez to conceptualize the nation as a mature person, capable of assuming the new challenges that the introduction of the *Socialismo del siglo XXI* and the creation of the PSUV entailed. Thus, Chávez's conceptualization of the nation shifted from an "active agent" to a "mature person." The conceptual metaphor that describes the new role of the country in Chávez's discourse is NATION IS A MATURE PERSON.

The conceptualization THE PEOPLE (or THE NATION) IS CHÁVEZ, found in the periods 1999-2001 and 2002-2004, also appeared in the period 2005-2007. According to this conceptual metaphor, opponents of Chávez are conceptualized as adversaries of the nation.

As was the case in the periods 1999-2001 and 2002-2004, the analysis of metaphors used by Chávez to conceptualize his revolution between 2005 and 2007 shows that conflict metaphors were the most frequent types of metaphors, accounting for 24% of all metaphors. Although this represents a decrease of 19% from the period 2002-2004, it is only 4% less than the percentage of conflict metaphors describing Chávez's Bolivarian Revolution for the 1999-2001 period.

As in the periods 1999-2001 and 2002-2004, Chávez conceptualized his Bolivarian Revolution as war in all conflict metaphors for the period 2005-2007. That is to say, the conceptual metaphor THE BOLIVARIAN REVOLUTION IS WAR was underneath each and every one of the cases.

Conflict metaphors only represented 13% of all metaphors conceptualizing Chávez's political project in the 2007 speech. This low proportion (in comparison with the rest of the corpus) may be due to the purpose of the speech rather than to a reversal of the trend observed in the other speeches (namely that conflict metaphors have maintained an essential role in conceptualizing Chávez's Bolivarian Revolution since 1999). Thus, Chávez's aim with that speech was to persuade members of the National Assembly in particular, and the people of Venezuela in general, that his proposal to reform the 1999 Constitution was viable and deserved to be submitted to a national referendum. Therefore, the president opted for employing metaphors that would conceptualize his project as a "building being constructed" rather than as a "war being fought." War

metaphors at that crucial moment of much-needed popular support would have probably been counterproductive given the polarizing effect that they had had in previous years.

The trend identified in previous years, in which Chávez explicitly presented his Bolivarian Revolution as the continuation of the independence revolution, manifested itself in the period 2005-2007 as well. Again, the underlying conceptual metaphor was BOLIVARIAN REVOLUTION IS BOLÍVAR'S PROJECT, which suggests that opposing the Revolution is the same thing as opposing the nation (given that Bolívar is the father of the nation in the Venezuelan collective imaginary).

The 2005 *Aló Presidente* is particularly significant in illustrating Chávez's intention to represent his Bolivarian Revolution as the continuation of Bolívar's independence wars given that it was during that *Aló Presidente* when he announced his decision to change two of the most important symbols of the Venezuelan nation: the flag and the coat of arms. It is interesting to note that in addition to metaphors, Chávez also employed other figures of speech, such as anaphora and similes, in an attempt to establish the relation between his political project and Bolívar's independence wars. This supports one of Charteris-Black's main points: "metaphors do not work in isolation from other rhetorical strategies" (Charteris-Black, *Politicians and Rhetoric* 30).

In the period 2005-2007 the target domain "opposition" not only included "former governments," "current opponents," and "US imperialism," but also a new sub-domain: capitalism (introduced by Chávez in 2005 in contrast to socialism).

In the period 2005-2007 opponents continued being conceptualized to a large extent in terms of conflict or crime. A total of 59% of all metaphors about the opposition were related to these source domains, compared to 39% and 59% for the periods 1999-2001 and 2002-2004 respectively.

Finally, as was the case in the period 2002-2004, the analysis of metaphors classified under the target domain “morality” for the period 2005-2007 reveals Chávez’s efforts to continue representing opponents as unpatriotic citizens lacking ethical and moral values. This is a trend that has been observed in all the speeches examined in this study since 2002, either directly (by calling them “apátridas”) or indirectly (through specific conceptualizations).

Chapter 7: Conclusions

For the past nine years, Venezuela has been going through an unprecedented political transformation in its contemporary history. This political change, initiated by Hugo Chávez and known as the Bolivarian Revolution, has provoked an interesting and favorable context for the analysis of political discourse.

Researchers based in Venezuela, led by Adriana Bolívar, Juan Eduardo Romero, Frances Erlich, Irma Chumaceiro and Lourdes Molero, have analyzed several aspects of the political discourse of Hugo Chávez and have provided invaluable information that has contributed to the understanding of Chávez's discursive strategies. This dissertation builds upon their conclusions and expands on some of their findings.

In an article entitled "Discurso político, comunicación política e historia en Hugo Chávez," Juan Eduardo Romero noted Chávez's use of history to reconstruct the past, delegitimize opponents and legitimize his political project. His findings served as a starting point to build one of the main arguments of this dissertation: that Chávez represents his revolution as the continuation of Bolívar's independence wars. Similarly, in her study "El Discurso de Hugo Chávez: Bolívar como estrategia para dividir a los venezolanos," published in 2003, Chumaceiro concluded that the excessive and reiterated use of the name "Bolívar" and the adjective "Bolivarian" in Chávez's discourse contributes to the polarization of the country given that it has two key functions: on the one hand it serves to legitimize his policies, and on the other it helps to delegitimize his opponents (representing them as detractors of Venezuelan national symbols). This study expands on Chumaceiro's findings and shows that Chávez not only represents opponents as detractors of Venezuelan national symbols, but also represents them as enemies of the nation.

This dissertation examines the metaphors used by Chávez from 1999 through 2007 in his efforts to construct and legitimize the political project known as the Bolivarian Revolution. It focuses on metaphors drawn from three of the most frequent target domains present in his discourse: the nation, his revolution, and the opposition. The study argues that behind an official discourse of inclusion, Chávez constructs a polarizing discourse of exclusion in which his political opponents are represented as enemies of the nation. Chávez's official discourse of inclusion is reflected in the government's ubiquitous slogan, "Venezuela ahora es de todos." This rhetoric can be found in both government speeches and official documents. The rhetoric of inclusion has existed in Chávez's discourse from the beginning of his presidency to the present.

This dissertation also shows that Chávez constructs this polarizing discourse of exclusion by combining metaphors that conceptualize: (a) the nation as a person who has been resurrected by his government, as a person ready to fight for his revolution, or as Chávez's himself; (b) the revolution as war; and (c) members of the opposition as war combatants or criminals. At the same time, the study argues that by making explicit references in his discourse about the revolution as the continuation of Bolívar's wars of independence, Chávez represents his opponents as enemies of the nation, given that in the Venezuelan collective imaginary Simón Bolívar is the symbol of the nation's emancipation.

Based on the analyses of data from previous chapters, the following seven sections will provide answers to the research questions established at the beginning of the study. These research questions are as follows:

- How has Bolívar become the symbol of the country's emancipation in the collective imaginary of Venezuelans?

- What are the metaphors used by Chávez when referring to the nation, his revolution, and the opposition?
- How do those metaphors conceptualize the nation, his revolution, and the opposition?
- How have those conceptualizations evolved from 1999 through 2007?
- Does the combination of those metaphors contribute to the representation of opponents as enemies of the nation? If so, how?
- Are there any explicit references in Chávez's speeches that represent his opponents as enemies of the nation? If so, what are those references?
- Are there any explicit references in Chávez's speeches that represent his Bolivarian Revolution as the continuation of Simón Bolívar's independence wars? If so, what are those references?

7.1. Bolívar as the Symbol of the Country's Emancipation in the Collective Imaginary of Venezuelans

The strategy of using Bolívar's legacy and imaginaries for political purposes has been present in Venezuelan politics since Bolívar's death. Most of the imaginaries related to Bolívar are based on three periods of his adult life: 1810-1818, 1819-1826, and 1827-1830. In the first period, Bolívar was a young and enlightened revolutionary leader who fought for Venezuela and New Granada. During the second one, he was recognized across the continent as a great universal liberator, a patriot who was able to see beyond national boundaries and take the revolution to its limits. In the last period, he was known as a statesman, a great leader who tried to establish institutions, assure security and promote reform. Some of the imaginaries that have emerged since Bolívar's death include Bolívar the demigod, the revolutionary, the democrat and the Catholic. In

addition, the imaginary that represents Bolívar as the leader who abolished slavery has persisted in Venezuelan society.

In his book El Culto a Bolívar, published in 1969, Venezuelan historian Germán Carrera Damas states that Bolívar symbolizes the nation's emancipation and argues that his presence has become a national cult:

En la vida ideológica de Venezuela la constante presencia de quien simboliza su emancipación ha adquirido la forma de un culto. Dicho culto rendido a Bolívar constituye el eje del culto heroico venezolano, en su forma más general. (285)

He defines the cult of Bolívar as follows:

Por culto a Bolívar entendemos la compleja formación histórico-ideológica que ha permitido proyectar los valores de la figura del Héroe sobre todos los aspectos de la vida de in pueblo. (21)

Damas argues that the cult is so ingrained in Venezuelan society that when analyzing it for research purposes, one does not need to justify its existence. He says that the cult of Bolívar can be considered a historical fact:

La elección del tema queda legitimada por la existencia real del culto reconocida y proclamada por sus promotores, y por la persistencia y la extensión del mismo, según se desprende de nuestra indagación. Cabría considerarlo, pues, un hecho histórico cuya objetividad se impone al investigador que intente comprender y explicar la evolución ideológica de Venezuela. (21)

In addition, Damas argues that the cult has become a historical need in Venezuelan society: “Su función ha sido la de disimular un fracaso y retardar un desengaño, y la ha cumplido satisfactoriamente hasta ahora” (42).

Although Venezuelan politicians have always used the cult of Bolívar, Chávez and his regime have taken the cult to a new level by attributing him a new identity, the socialist Bolívar (Lynch 304). Chapter 3 of this study describes the cult of Bolívar in detail as well as the ideologies behind Chávez’s Bolivarian Revolution.

7.2. Metaphors Used by Chávez When Referring to the Nation, His Revolution, and the Opposition

Chávez’s choice of metaphors changed throughout the three periods analyzed in this dissertation. His most frequent metaphors were those describing the nation in the period 1999-2001, the opposition in 2002-2004, and his revolution in 2005-2007. This shift of focus seems to reflect the political contexts that characterized each of those periods. Thus, in 1999-2001, when Chávez was elected president of Venezuela for the first time, the country was going through one of the most serious crises in its contemporary history characterized by a political environment of increasing corruption, unpopular neoliberal policies, and widespread dissatisfaction with the two parties that had ruled the country since 1958. In this conjuncture, Chávez emerged with a discourse of national refoundation in which he distanced himself and his revolution from previous governments. Thus, the nation became the main focus of his discourse and of his choice of metaphors. Similarly, in the period 2002-2004, after the 2002 coup d’état, the president adopted a confrontational discourse in which opponents became the main focus of his discourse and of his choice of metaphors. Finally, in the period 2005-2007, when the president’s main aim was to consolidate his political project by creating the PSUV

(*Partido Socialista Unido de Venezuela*) and by passing his constitutional reform, the focus of the president's discourse and of his choice of metaphors became his revolution.

In all three periods, most metaphors used to describe the nation were personifications, most metaphors used to describe his revolution were conflict metaphors, and most metaphors used to describe the opposition were conflict or crime metaphors. Some metaphors to describe the nation throughout the three periods included: "Venezuela está resucitando, se está levantando una patria nueva," "el país los vio, el país completo los vio," and "un pueblo que ahí está demostrando solidez ideológica, demostrando madurez política, demostrando coraje a prueba de todo." Similarly, examples that describe the revolution included: "en todo el país se ha iniciado un programa ofensivo, una ofensiva muy agresiva, muy rápida de construcción de viviendas," "pero yo voy a enunciar algunas gruesas líneas estratégicas acerca de lo que considero debemos hacer," and "Así como estamos liberando la Patria, estamos liberándola también por supuesto desde abajo." Finally, examples that describe the opposition included: "ellos están asumiendo la batalla política," "no hemos tenido la suerte de contar con una oposición seria; con una oposición leal al país," and "podremos derrotar la fuerza del imperialismo y de la oligarquía lacaya que aquí pervive desde siempre."

To conclude this part, it is important to mention that in this analysis all metaphors referring to "nación," "pueblo," "república," and "país," were classified under the target domain "nation." Metaphors referring to "el gobierno de Chávez," "sus planes políticos," "la revolución," "el proceso," and "el socialismo del siglo XXI" were classified under the target domain "Bolivarian Revolution." Finally, metaphors referring to "former governments," "current opponents," "US imperialism," and "capitalism," were classified under the target domain "opposition." Given that the main argument of the dissertation is

to demonstrate that opponents are represented as enemies of the nation, the target domain “opposition” was broken down in order to see the shifts that the president’s discourse took when speaking about opposition. For instance, in 1999 and 2000, when the president was representing his revolution as a refoundation of the nation while distancing himself and his Bolivarian Revolution from past governments, all of Chávez’s metaphors about the opposition referred to former governments. In the period 2002-2004, when opponents began to be represented as enemies of the nation, his metaphors about the opposition referred to current opponents and US imperialism. Finally, the trend that emerged in 2002-2004 continued in the period 2005-2007 (the consolidation stage of the revolution), when most metaphors representing the opposition referred to current opponents, US imperialism and capitalism.

7.3. Chávez’s Conceptualizations of the Nation, His Revolution and the Opposition

The analysis revealed that between 1999 and 2001 the president’s main rhetorical objective was to separate himself and his Bolivarian Revolution from all previous Venezuelan governments of the democratic era that began in 1958 in an attempt to construct a discourse of national refoundation. For this, he represented the nation as a “resurrecting person” (or as “Chávez”), conceptualized his project in terms of “war against previous regimes,” and portrayed former governments with destruction metaphors and current opponents with conflict metaphors. The most common conceptual metaphors underlying these representations were: THE NATION IS A RESURRECTING PERSON (or THE NATION IS CHÁVEZ), THE BOLIVARIAN REVOLUTION IS WAR, FORMER GOVERNMENTS ARE COLLAPSING BUILDINGS, and CURRENT OPPONENTS ARE COMBATANTS.

Between 2002 and 2004, the analysis revealed that Chávez's main rhetorical objective was to polarize an already divided country by gradually creating a discourse in which his Bolivarian Revolution was mainly conceptualized as a conflict between supporters and opponents. Personifications were used by Chávez to conceptualize the nation as "a healthy and vigorous person, capable of using all her senses." This contrasts enormously with the period 1999-2001, when the nation was presented as a "recovering person." Also, as in the period 1999-2001, he represented the nation as "Chávez." Moreover, Chávez's Bolivarian Revolution continued to be conceptualized as war, and the opposition was first defined only in terms of Venezuelan opponents, but later in terms of allies of US imperialism as well. By creating a polarized political environment, and by portraying his opponents as allies of US imperialism (which suggests that they are enemies of the nation), Chávez contributed to constructing a discourse in which opposing his revolution is conceptualized as opposing the nation. The most common conceptual metaphors underlying these representations were THE NATION IS AN ACTIVE AGENT (or THE NATION IS CHÁVEZ or A SUPPORTER OF CHÁVEZ), THE BOLIVARIAN REVOLUTION IS WAR, and OPPONENTS ARE UNPATRIOTIC CITIZENS (or TRAITORS), and IMPERIALISM IS A CRUEL COMBATANT.

Finally, the analysis of metaphors for the period 2005-2007 indicates that Chávez's primary rhetorical objective was to support the institutionalization of his revolution by consolidating the political discourse that he had been constructing since 1999. For this, Chávez shifted the conceptualization of the Venezuelan nation from "an active agent" to "a mature person," while continuing to represent his revolution as war and to portray his political opponents as criminals and enemies of the nation. In some cases, like in previous periods, he continued to represent the nation as "Chávez." In

addition, Chávez introduced in his discourse the concept of capitalism and conceptualized it as a new threat to his Bolivarian Revolution. The institutionalization that the president tried to support with his discourse consisted of the introduction and acceptance of “socialism of the twenty-first century” as a viable political system, the creation of the PSUV (*Partido Socialista Unido de Venezuela*), and the approval of constitutional reforms. The most common conceptual metaphors underlying these representations were THE NATION IS A MATURE PERSON (or THE NATION IS CHÁVEZ), THE BOLIVARIAN REVOLUTION IS WAR, THE OPPOSITION (or IMPERIALISM) IS A COMBATANT, OPPONENTS ARE UNPATRIOTIC CITIZENS, and CAPITALISM IS A TOOL OF EXPLOITATION.

7.4. Evolution of Chávez’s Conceptualizations from 1999 through 2007

Chávez’s main conceptualizations of the nation went from a “resurrecting person” in 1999-2001, to an “active agent” in 2002-2004, to a “mature person” in 2005-2007. At the same time, during the three periods, he continued to conceptualize the nation as “Chávez.”

The Bolivarian revolution was mainly conceptualized as war during the three periods considered. However, the last period showed high frequencies of conceptualizations of the revolution as a “journey” and as a “building.” The presence of these conceptualizations can be explained by the fact that during that period the president was trying to create the PSUV and to get his constitutional reform approved. In the case of the constitutional reform, the usual conceptualization of the revolution as war would have probably not contributed to create the national consensus necessary to get it approved (given the polarizing effect that conflict metaphors had had in the past). Journey and construction metaphors, however, have elements of “moving ahead together”

or “building something together” more likely to contribute to create consensus around his political projects. In the 2006 speech of the corpus Chávez said: “la política, la política desde este punto de vista debe definir qué es lo que queremos, hacía dónde es que vamos,” and “vamos a pedirle ayuda a ellos para que cooperen con nosotros en la construcción del proyecto.” In the period 2005-2007, the president introduced his *Socialismo del Siglo XXI*, which was mainly conceptualized with construction metaphors: “el socialismo es un proceso de todos los días, de construcción diaria, avanzaremos hasta donde podamos.”

The opposition, which in the period 1999-2001 mainly consisted of former governments in Chávez’s discourse, was essentially conceptualized as “collapsing buildings.” Current opponents, which began to appear in his discourse toward the end of the period, were mainly conceptualized as “combatants.” During the period 2002-2004, and with the introduction of US imperialism in the president’s discourse, opponents began to be represented not only as opponents of Chávez’s government but also as enemies of the nation. Thus, opponents were conceptualized as “unpatriotic citizens” and “traitors,” and US imperialism as a “cruel combatant.” Finally, in the period 2005-2007, the trend of conceptualizing opponents as “unpatriotic citizens” was maintained in Chávez’s discourse, which contributed to their representation as enemies of the nation. This was supported by the introduction of capitalism, which was immediately linked in Chávez’s discourse to the opposition.

7.5. Combination of Chávez’s Conceptualizations and its Contributions to Representing Opponents as Enemies of the Nation

In general terms, by having conceptualized the Bolivarian Revolution as war during the three periods considered in this analysis, Chávez created a belligerent

discourse in which supporters and opponents of his revolution were implicitly confronted. This conceptualization contributed to the polarization of the nation given that opponents were not seen as political adversaries but as war enemies.

It can be argued that since the period 1999-2001, Chávez began to create a polarizing discourse by separating himself and his Bolivarian Revolution from previous governments, by conceptualizing the nation as a resurrecting person (which implies that the nation was killed by former governments), by conceptualizing his revolution as war, and by representing current opponents with conflict metaphors. This early polarizing environment was reinforced by the conceptualization of the nation as Chávez, which implies that opposing Chávez is equivalent to opposing the nation.

The 2002 coup d'état accentuated the polarization and provoked Chávez to adopt a much more confrontational discourse. In the period 2002-2004, the Bolivarian Revolution continued being conceptualized as war and the nation as "Chávez." Those two conceptualizations intensified the polarization: in a war environment an opponent of Chávez is an opponent of the nation. Also, by conceptualizing the nation as an "active agent ready to defend the revolution," Chávez contributed to create a representation of the political environment in Venezuela as a war zone. Moreover, given that the opposition was defined in terms of allies of US imperialism, this also contributed to creating a polarized political environment, especially because the US was represented as a major foreign threat. Also, by employing morality metaphors, Chávez conceptualized opponents as unpatriotic citizens. The combination of all these conceptualizations intensified the polarization in the country during the period 2002-2004, creating a representation of opponents as traitors to their country.

In the period 2005-2007, the “opposition” target domain not only included “former governments,” “current opponents,” and “US imperialism,” but also a new sub-domain: capitalism (introduced by Chávez in 2005 in contrast to socialism). The conceptualization of the nation as “Chávez,” found in the periods 1999-2001 and 2002-2004, also appeared in the period 2005-2007. Again, this conceptualization suggests that opponents of Chávez are adversaries of the nation, especially when taking into account that his Bolivarian Revolution continued being conceptualized as war and political opponents as criminals and combatants. As was the case in the period 2002-2004, the analysis of metaphors classified under the morality target domain from the period 2005-2007 reveals Chávez’s efforts to continue representing opponents as unpatriotic citizens lacking ethical and moral values. This is a trend that has been observed in all the speeches examined in this study since 2002, either directly (by calling them “apátridas”) or indirectly (through specific conceptualizations). In sum, the analysis of Chávez’s metaphors for the three periods supports the argument that opponents of Chávez are represented in his discourse as enemies of the nation.

7.6. Explicit References That Represent Chávez’s Opponents as Enemies of the Nation

The few explicit references that represent Chávez's opponents as enemies of the nation began to appear in the corpus in 2004, with the introduction of US imperialism. Before 2004, Chávez used to call opponents in different ways without suggesting that they were enemies of the nation. Some adjectives with negative connotations drawn from the corpus used by Chávez to refer to his opponents prior to 2004 include: “escuálidos” (2001), “irresponsables,” “saboteadores” (2002), and “golpistas” (2003).

In 2004, in addition to referring to opponents as “la oposición fascista venezolana,” the president began to represent them as potential enemies of the nation by calling them “[oligarquía] lacaya del imperio.” In 2005, he called them “oligarquía apátrida,” implying that they had betrayed the nation by resigning to the Venezuelan citizenship. In 2007, Chávez called them again “oligarquía lacaya” and even “oligarquía cipaya,” implying once again that they had betrayed the nation.

It is interesting to note that in the corpus of the study the number of explicit references used by Chávez to represent opponents as enemies of the nation are very few compared to the number of identified metaphors that accomplish that same function. This suggests that in Chávez’s political discourse, metaphors play a central role in creating representations such as this one.

7.7. Explicit References That Represent Chávez’s Bolivarian Revolution as the Continuation of Bolívar’s Independence Wars

The corpus contains a few examples in which Chávez represents explicitly his revolution as the continuation of Bolívar’s independence wars. For instance, during the period 1999-2001, when speaking about *La Batalla de Carabobo* (the battle that sealed the country’s independence), Chávez said:

[A]quella batalla, de aquella gesta, de aquella esperanza, de aquella lucha que es la misma lucha de hoy. Esta es la continuación de aquella revolución, “La Bolivariana.”

Similarly, in the period 2002-2004, when referring to Bolívar’s independence efforts, Chávez said:

[E]l proyecto bolivariano, el proyecto unitario, el proyecto liberador, el proyecto igualador, el proyecto de la felicidad, la mayor suma de felicidad para un pueblo, y ese es el proyecto que ha regresado ahora.

Finally, in the period 2005-2007, when speaking about the events of the second coup d'état of 1992, carried out by his comrades, Chávez said:

[E]stábamos también rompiendo definitivamente con el pasado y abriendo un camino hacia el sueño de Bolívar, hacia el sueño de la Patria justa, de la Patria libre, de la Patria grande.

Bolívar is represented in the collective imaginary of Venezuelans as *El Libertador*, the symbol of the nation's emancipation, the founder of the republic. Therefore, by representing his political movement as the continuation of Bolívar's independence wars, Chávez is contributing to the conceptualization of his opponents as enemies of the nation.

7.8. Limitations of the Study and Future Research

The main limitation of the study deals with the fact that it focuses mainly on the analysis of metaphors. As noted in chapter 6, Chávez also employs many other figures of speech. As Charteris-Black notes, metaphors do not work in isolation from other rhetorical strategies. In fact, he argues that they become more persuasive when they are combined with other rhetorical strategies.

In terms of the methodology, it is worth noting that in the interpretation stage, conceptual metaphors are identified according to the theory of metaphors developed by Lakoff and Johnson. According to them, only metaphors that appear frequently in the corpus should be considered, given that this helps to diminish the subjectivity element associated with the determination of conceptual metaphors. However, in practice, some

metaphors that are significant were considered in this study despite the fact that they appeared relatively infrequently. An example of this is the conceptual metaphor THE NATION IS CHÁVEZ that appeared in 2001. This metaphor only appeared one time that year, but other times in subsequent years.

Also, the explanation and interpretation stages in Critical Metaphor Analysis have elements of subjectivity. Having metaphors explained and interpreted by more than one researcher would significantly reduce this factor. This might be best achieved with a group of researchers individually identifying problems of interpretation, and then collaboratively working to resolve them.

Future studies might also benefit from comparing Chávez's choice of metaphors with other politicians' metaphors, especially from Venezuela and other Latin American countries. These comparisons could add new and interesting dimensions to the field of inquiry. For instance, Chávez's choice of metaphors could be compared with that of former Venezuelan president Carlos Andrés Pérez, another leader known for his charismatic discourse. Another interesting comparison would be between Chávez's discourse and that of Fidel Castro, given the close personal relationship between the two leaders. A larger project could compare political discourses of contemporary leftist leaders across Latin America to test, for instance, Teodoro Petkoff's argument that there are now two different lefts in Latin America, one pragmatic and the other reactionary (or "*borbónica*") (Petkoff, *Dos izquierdas*).

In his book Politicians and Rhetoric, Charteris-Black compares eleven different politician figures from the UK and the US, ranging from Winston Churchill to Bill Clinton, which allows him to trace the role that metaphors play in creating persuasive

belief systems through an analysis grounded in comparative political discourse. A similar project could be undertaken with politicians in the Spanish-speaking world.

In sum, this dissertation is part of a broader tradition of political discourse analysis across Latin America, and builds on the conclusions of other researchers who have analyzed Chávez's political discourse. It covers more years than any other study of its kind, and represents the first comprehensive analysis of metaphors used by Hugo Chávez in his political discourse. Its main purpose has been to demonstrate that behind an official discourse of inclusion, the president constructs a polarizing discourse of exclusion in which his political opponents are conceptualized as enemies of the Venezuelan nation.

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