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**Resource Nationalism in Mexico:
The Construction of a National Identity and its Impact on Climate Change
Policy**

By:

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A thesis submitted in fulfilment of the requirements for the degree of
Doctor of Philosophy

The University of Sheffield
Faculty of Social Sciences
Department of Politics

30th of September 2018

Abstract

Resource nationalism in Mexico represents a symbol of sovereignty, and it is a pillar of the national identity. The resource nationalism discourse perpetuates the dependency and exploitation of fossil fuels, which negatively impacts the relevance, and implementation of climate change policy. In this thesis, I use constructivism to analyse the resource nationalism discourse in Mexico, its construction, and its impact on climate change policy. To conduct this research, I explored discursive strategies of the political elites in Mexico. I based my methodology on the discourse historical approach of critical discourse analysis. Firstly, I analysed the historical construction of the resource nationalism discourse. Given the salience of the oil nationalisation of 1938 in the modern resource nationalism discourse, I explored the presidential term of Lázaro Cárdenas from 1934 to 1940 alongside with its historical precedents. Secondly, I explored the discursive strategies used in the Congress from 1994 to 2012. I chose this period of time due to the development and relevance of climate change policy. In the critical analysis, I interpreted the elements of the resource nationalism and climate change discourses. The resource nationalism discourse has at its core a mythicized perception of the oil nationalisation as a fight against exploitation from foreign countries. From the historical resource nationalism emanated the modern elements of the discourse: state ownership, sovereignty, and social justice. The resource nationalism discourse has been institutionalised throughout the years in the energy policy becoming a pillar of the national identity. In contrast, climate change discourse is portrayed as an act of compliance with international policy, which reduces the domestic urgency to develop a sustainable energy policy.

Keywords: Resource nationalism, national identity, climate change policy, Mexican energy sector, constructivism, discourse analysis.

Acknowledgements

I would like to express my gratitude to all the people who supported me along the way of developing this research and writing this thesis. Firstly, to my parents Dr. Carlos Polanco and Mrs. Graciela Leal, who have always loved me and supported me, thank you for all your efforts, sacrifices, and your continuous support throughout my education. To my husband, Dr. Timothy Riley thank you for always being there, through thick and thin and for sharing so many wonderful times with me. To my supervisor Dr. Hayley Stevenson, thank you for all your constant support, your insights, and specially for being such a wonderful friend. To my second supervisor, Dr. Ian Bache thank you for your support and help in completing this thesis. To Mrs. Sarah Cooke, for being such a caring and wonderful friend, thank you for all your support throughout these years. To my PhD friends Brenda, Claire, and Teresa for making this experience so much more enjoyable, and for all our lovely times together. To my examiners Dr. Matthew Bishop and Dr. John Childs, thank you for giving me your thoughts on this thesis, they are very valuable and make a great addition to this work. To family, friends, and all the people who have supported me along the way, thank you.

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Acronyms

CNC – Confederación Nacional Campesina (National Confederation of *Campesinos*)

CTM – Confederación de Trabajadores Mexicanos (Confederation of Mexican workers)

EZLN – Ejército Zapatista de Liberación Nacional (Zapatista army of national liberation)

UNFCCC - United Nations Framework Convention for Climate Change

IR – International Relations

NAFTA - North American Free Trade Agreement

PAN – Partido Acción Nacional (National Action Party)

PEMEX - Petroleos Mexicanos (Mexican petroleum)

PNR – Partido Nacional Revolucionario (National Revolutionary Party)

PRI – Partido Revolucionario Institucional (Institutional Revolutionary Party)

PRD - Partido de la Revolución Democrática (Democratic Revolution Party)

PRM – Partido de la Revolución Mexicana (Mexican Revolution Party)

PSD – Partido Social Democrata (Social Democratic Party)

PT – Partido del Trabajo (Labour Party)

US - United States of America

Chapter 1. Introduction

"Men argue, nature acts" (Voltaire, 1764)

Climate change is a challenge that touches upon one and all. From noticing unusual weather changes to witnessing the bleaching of coral reefs, we are all spectators of the effects of anthropogenic climate change (Pandolfi et al., 2011; Hughes et al., 2017). However, as a society we have a choice between continuing with the unsustainable production and consumption of fossil fuels or taking action to mitigate and adapt to climate change. There is a wide scientific consensus on the correlation between the use of fossil fuels and global warming. This body of research recognizes the need for an energy transition from fossil fuels towards renewable energy (IPCC, 2011; 2014). Consequently, it is essential to uncover and understand the sociopolitical factors that pose an obstacle for the implementation of climate change policy and the barriers that hinder transitions to more sustainable energy systems. By gaining understanding of the obstacles for implementing climate change policy, it is possible to understand what changes need to be addressed in order to advance climate change mitigation and adaptation.

The main aim of this thesis is to explore the case of resource nationalism in Mexico and its impact on climate change policy. In order to address this aim, the first objective is to understand the construction and institutionalisation of the resource nationalism discourse. Resource nationalism in Mexico has become a symbol of sovereignty and national identity. In order to address this first objective, I illustrate how resource nationalism became part of the national identity and how resource nationalism has changed throughout time. The second objective of this thesis is to assess how the resource nationalism discourse is a barrier for effective and ambitious climate change policy. I argue that the discursive practices of

resource nationalism facilitate and justify the over exploitation of fossil fuels, hence competing against the objectives of climate change policy. In order to examine this topic, I use a constructivist theoretical framework and a discourse historical approach of critical discourse analysis as a methodological tool.

In this introductory chapter, I first present the significance of this research followed by the research problem and research question, an explanation of the original contributions to knowledge, and the argument of this thesis. I conclude with an overview of the structure of the thesis.

1.1 Significance

In order to provide a clear framework on the significance of this research, I begin this section by establishing a general overview on the effects of global warming. I move on to discuss the impact and vulnerability of Mexico to climate change and finalize with the relevance of energy strategies to address climate change. I focus the argument on providing an understanding of the relationship between the energy sector and global warming, particularly the use and production of fossil fuels. The importance of an effective application of climate change policy is based in a worldwide need for change in energy dynamics. This is particularly relevant for Mexico given the effects that climate change can have in the country, due to its geographical location.

The increase in the production of greenhouse gases since the industrial revolution is causing a rise in the global temperature. Some of the consequences of the increase in global temperature include a sea level rise with loss of coastal wetlands, the loss of several islands, and millions of people being displaced and experiencing flooding each year. The climate change related damage to ecosystems could represent the extinction of over 40% of the world's species and widespread coral mortality. The environmental destruction caused by

climate change can cause a vicious cycle of dangerous weather feedbacks, a cycle that could potentially be irreversible (IPCC, 2012; 2014; Wessely et al., 2017; Shayegh, 2017).

There is a high possibility that climate change will increase the risk of extreme weather events, such as but not limited to, cyclones, hurricanes and droughts. The social impact of climate change can trigger shortages in water supply and distribution, damage to agriculture and diminished food security (IPCC, 2012; 2014). Developing countries are more vulnerable to climate change and highly likely to have a greater economic impact (Sagar, Oliver and Chikkatur, 2006; Díaz and Moore, 2017).

If the sea level rises one meter or more, Mexico would be one of the most affected countries in Latin America. Mexico could lose more surface area than any other Latin American country and would have the second highest rate of affected population, just after Brazil. Mexico is especially vulnerable to climate change, due to its ecosystem diversity and geographical location (CEPAL, 2010). Mexico is one of the main producers of fossil fuels in the world. This positions Mexico as an important participant in the journey to mitigate and adapt to climate change.

It is particularly important for developing countries to modernize the energy sector. Even when most developing countries have a limited institutional capacity to work towards climate change mitigation, there is an increasing pressure to undertake commitments to mitigate climate change. Even if a developing country has limited resources compared to an industrialized country, it can still become a leader in energy modernization. This is possible if certain factors are developed properly such as: an effective regulatory framework, efficient use of the current resources and investment in research and development to address further challenges. Energy policy in developing countries should not only focus on energy supply, but also on efficiency in production and consumption (Sagar et al., 2006). Jean-Baptiste and Ducroux (2006) argue that climate change needs to be addressed in energy policy and give

three strategies that can be combined to approach this problem. The first strategy is energy conservation. The second strategy is carbon management; including enhanced carbon storage on land by natural ecosystems, CO₂ capture and geological storage. The third strategy is a greater reliance on renewable energies.

Energy is a requirement to fulfil several social needs and services, such as transportation, health and communication. In the economic aspect energy promotes growth at a macroeconomic level. However, from an environmental perspective non-renewable energy represents a major source of damage to ecological systems. Even though the role of energy in the international agenda has evolved slowly, it has set a framework to be followed by domestic policies. Some of the energy-related recommendations of mechanisms to mitigate climate change are: energy efficiency, phase out subsidies, and development of energy conservation technologies (Najam and Cleveland, 2003).

Latin America has an opportunity to transform the energy order around the world. According to Sanchez (2005), industrialized and developing countries are differentiated in levels of energy consumption. Given the great amount of Latin American oil reserves, it gives them an advantage in the energy market and the opportunity to promote a shift towards renewable energy sources. Sanchez argues that energy policy should focus on developing an efficient way of consuming energy while the world energy order shifts towards renewable energy.

While the energy sector represents a powerful force in the global economy and fulfils social needs, an energy mix based in fossil fuels is contributing to dangerous levels of environmental degradation. Hence countries need to diversify the energy mix and move towards renewable energy sources. In order to do so, the international discussion of climate change has enabled countries, such as Mexico, to develop climate change policy. For climate change policy to be successfully applied, it is important to understand what barriers are in

place, in order to determine how to overcome them. In this thesis, I make a case for how resource nationalism is posing an obstacle for climate change policy. By gaining understanding of the construction and institutionalization of resource nationalism as a symbol of sovereignty and element of the national identity, I reveal the complexities of the resource nationalism discourse and the lessons that we can learn and apply to advance climate change policy.

1.2 Research Problem and Research Questions

An effective execution of climate change policy is a key element to successfully mitigate and adapt to climate change. However, Mexico faces a dilemma between continuing with the traditional approach of energy policy or implementing structural changes to achieve the goals of the general law of climate change. Resource nationalism magnifies the short-term social and economic benefits of intensive fossil fuel production and consumption at the cost of long-term sustainability. The resource nationalism discourse particularly focuses on the use of oil revenues to provide social services such as, education, and health. The oil nationalization of 1938 is a cornerstone of the resource nationalism discourse, it is regarded as a symbol of sovereignty and cultural heritage, it is a *political victory* in the collective memory. This has created a challenge for any kind of change in the energy sector. Given that climate change policy requires significant changes in the energy sector, resource nationalism and climate change policies are competing norms. Later in this thesis I provide a more detailed overview of the energy sector and climate change policy in Mexico.

The main aim of this research is to understand how and to what extent the resource nationalism discourse is posing an obstacle to achieving the objectives of climate change policy in Mexico, particularly the goals of the general law of climate change. In order to

address this issue, it is important to understand the origins of resource nationalism, how it was constructed, and how it has evolved since the oil nationalization of 1938. I explore the resource nationalism discourse from 1994 to 2012 because of the increased relevance of climate change and the consequential need to change energy policy during this period of time. In this thesis, I explore the following research questions:

1. How does the resource nationalism discourse pose an obstacle for climate change policy in Mexico?
 - a. How was resource nationalism in Mexico constructed and institutionalized?
 - b. How was the resource nationalism discourse presented from 1994 to 2012?
 - c. How does the discursive representation of resource nationalism conflict with the discursive representation of climate change?

In order to answer these questions, I conducted a critical discourse analysis based on the discourse historical approach, of which I provide further details in the methodology chapter. In the following section, I discuss my original contributions to knowledge gained from the examination of the research questions.

1.3 Original Contributions to Knowledge

This thesis is supported by original research conducted using the discourse historical approach of critical discourse analysis and based in a constructivist theoretical framework. From completing this research, my original contributions to knowledge are the following:

1. My first contribution to the body of knowledge is a constructivist analysis of resource nationalism in Mexico. So far, most studies on resource nationalism have focused on an economic perspective. In this perspective, resource nationalism is often attributed

to the national protection of the economic benefits of extractivism (Vivoda, 2008; Click and Weiner, 2009; Joffe et al. 2009; Mares, 2010; Wilson, 2015; Kaup and Gellert, 2017; Li and Adachi, 2017). Few have looked at resource nationalism from an ideational standpoint and acknowledged elements such as national identity in the analysis of resource nationalism (Bremmer and Johnston, 2009; Kohl and Farthing, 2012; Childs, 2016; Andreasson, 2015; Rosales, 2017), and none have used a constructivist lens to explore the historical construction of resource nationalism specifically in Mexico. In this first contribution, I uncover the complexities of resource nationalism: its institutionalisation as part of the national identity and its evolution in the modern sociopolitical context. I analyse resource nationalism with the discourse historical approach of critical discourse analysis, which enabled me to use three levels of discursive analysis: lexical, intertextual and contextual. Lexical analysis involves the interpretation of terms and lexical strategies used in a given text. Intertextual analysis maps the lexical similarities found between the texts relevant to the topic. Contextual analysis explores the relationship between the texts and the sociopolitical context (Reisigl and Wodak, 2009; Wodak et al., 1999). As a result of using three levels of analysis, I was able to interlink discursive practices with sociopolitical context in order to understand the dynamics of resource nationalism.

2. My second contribution to knowledge is the analysis on the impact of the resource nationalism discourse on climate change policy. Resource nationalism was institutionalized in the first half of the twentieth century. The *political victory* of the oil nationalisation has become part of the collective memory and symbol of sovereignty in the national identity. In this thesis, I argue that the discursive practices of resource nationalism encourage the exploitation of fossil fuels, by magnifying the historical pride and the short-term social and economic benefits of fossil fuels,

without acknowledging their negative implications over long-term sustainability. The understandings achieved from this analysis show that the resource nationalism discourse uses elements of social justice and cultural heritage to justify the continued production and use of fossil fuels. Conversely climate change policy aims to reduce greenhouse gases, as well as to develop and use renewable energies. Climate change policy in Mexico was adopted from international agreements, based on the urgency to tackle global warming, and gained relevance in the last decade. Resource nationalism originated domestically several decades ago, and it is a well-established social construct. Hence, resource nationalism has a greater relevance in the collective memory and continues to magnify the short-term social benefits on the use of fossil fuels at the cost of long-term sustainability. This shows a colossal disparity between the competing norms of resource nationalism and climate change policy. As a final note in this contribution to knowledge, I discuss the discursive elements that resource nationalism presents, and consider the suitability of using similar lexical elements to advance the discursive representation of climate change policy in Mexico.

1.4 Argument

In this section I explain the argument of this thesis, which I developed in response to my research questions. In order to assess the impact of resource nationalism on climate change policy, it is necessary to understand how resource nationalism came to be, how it was institutionalized and its meaning in the discursive practices of the political elites. The argument of this research is built in three levels: historical construction of resource nationalism, contemporary evolution of resource nationalism, and impact of resource nationalism on climate change policy. The corpus for this analysis was primarily composed

by transcriptions of debates from the Congress, which resulted in an understanding of the perceptions of political elites regarding resource nationalism and climate change.

In this thesis, I argue that the understanding of the resource nationalism discourse by the political elites in Mexico from 1994 to 2012 can be categorised in three elements: core, derived and variable values. At the core of the resource nationalism discourse is a mythified perception of the oil nationalisation and the idealisation of Lázaro Cárdenas as a heroic figure whose actions and words possessed unquestionable veracity. The derived values consist of the understandings that emanated from the historical resource nationalism: state ownership, sovereignty, and social justice. These elements are closely intertwined, state ownership is regarded as the heritage of Cárdenas and the symbolic representation of sovereignty. The oil nationalisation is perceived as an act of self-determination that represented a victory against foreign exploitation. Social justice, in the context of resource nationalism, is perceived by the political elites as the ultimate goal of Cárdenas' fight against foreign exploitation. These elements of the discourse show that the political elites view as their duty to protect the energy sector and its traditional dynamics. The final component of the resource nationalism discourse consists of the variable values, which are the understandings that have changed throughout time and are influenced by the sociopolitical context, these are: privatisation, foreign intervention and the scope of social justice.

The discourse of resource nationalism was constructed and institutionalised in the early years of modern Mexico, consequentially the reproduction of resource nationalistic practices embedded the symbols of resource nationalism in the Mexican national identity. I argue that this construct reflects in the protectionism of the energy sector. Climate change on the other hand has a very different representation, the political elites perceive climate change policy as a responsibility to comply with international agreements, often aiming to distance the domestic responsibility and need to effectively address climate change. I argue that

political elites fail to represent the negative impacts of climate change on the livelihood of the people, as well as its negative impact on social justice.

The deconstruction of the resource nationalism discourse and the analysis of the construction of resource nationalism shows a flawed logic in the perception of the political elites regarding the mythification of Cárdenas and the oil nationalisation. In this thesis, I argue that the oil nationalisation was part of a legitimisation strategy, which aimed to differentiate Cárdenas from his predecessors and gain the support of a highly divided nation. I argue that Cárdenas used the historical precedent of foreign exploitation to present the foreign oil companies as an enemy to defeat, thus making the oil nationalisation a victory that would unite the nation. In the following sections I provide a detailed narrative of the argument that I constructed to answer the research questions.

1.4.1 How was resource nationalism constructed and institutionalized?

The historical construction of resource nationalism begins with a colonial precedent of foreign exploitation. Since the arrival of the Spanish to America, and the disruption in the native cultures, Latin American countries struggled with a sense of identity. From the beginning of colonial times, the process of *mestizaje*, which is the Spanish term for interracial and cultural intermixing, increased this struggle by adopting foreign norms and understandings, and changing or forgetting native ones.

Throughout the period of the Mexican independence process, in the early 19th century, the discussion in the Spanish courts aimed to develop a new constitution for the American territories in order to pacify the domestic struggles. Representatives from Mexico voiced their positions and demands to the Spanish court, and brought some early precedents for resource nationalism. In this precedent, the representatives appeal to the sense of social justice and the need for self-determination for individuals regardless of their caste, given that they cultivate

the soil that produces nourishment and extract the silver that develops the economy (King, 1953).

During the first hundred years of independence, Mexico exhibited a continued sociopolitical instability. Porfirio Díaz ruled for a total of thirty-four years, until the Mexican revolution of 1910. At this time Francisco I. Madero, who stood for a democratic country and against re-election, became president. Madero was later betrayed and murdered, which led to a period of political instability where several revolutionary factions were fighting against each other. In 1917, the Mexican constitution was issued, but there was still continuous political conflict. In 1929, former president Plutarco E. Calles, establishes the National Revolutionary Party (PNR) which later became the Institutional Revolutionary Party (PRI) that held office uninterruptedly until the year 2000 (Krauze, 1997).

In 1934, Lázaro Cárdenas became president. During his term, Cárdenas was a norm entrepreneur who influenced the social structures of his time. A norm entrepreneur is an actor who changes social norms and produces social change (Finnemore and Sikkink, 2001). I argue that his strategies as president aimed to provide sociopolitical stability after decades of hostility, struggle and betrayals. Part of providing stability to the country was to find shared ideational imaginaries that would unite the country, which set the basis for the oil nationalization of 1938. I argue that the lasting result of the institutionalization of resource nationalism was an unintended effect of Cárdenas' strategies to stabilize the country, and legitimise his government.

Based on the analysis of the sociopolitical context I argue that Cárdenas used several strategies to legitimise his government and develop strong political structures. Among his strategies, Cárdenas changed the name of PNR to Mexican Revolution Party (PRM) positioning him as a reformer within his party. Cárdenas supported the unions and established the confederation of Mexican workers (CTM), which was aligned to the *official party* (PRM),

and provided a strong supporter base. Cárdenas used discursive practices that were easy for the masses to understand and appealed to the need for social justice. The oil nationalization of 1938 was a statement of self-determination to the international community and a political victory for the domestic society. Given the precedents of identity struggle and foreign exploitation; this political victory gave the people a sense of unity to fight against a common enemy.

1.4.2 How was the resource nationalism discourse presented from 1994 to 2012?

The years that followed Cárdenas' administration continued to reinforce the post-revolutionary social structures, and maintained traditional practices in the energy sector. In 1994, during the presidential term of Ernesto Zedillo, fifty-six years after the oil nationalization, Lázaro Cárdenas was regarded as a national hero and the Mexican government was highly reliant on oil revenues. From 1994 to 2012 the sociopolitical context changed considerably, from international cooperation to domestic advances in democracy. The North American Free Trade Agreement (NAFTA) became a landmark that changed the trade relations of Mexico. In the year 2000, Vicente Fox became president, ending a ruling of over seventy years of the official party.

During the presidential terms of Ernesto Zedillo, Vicente Fox and Felipe Calderon, most discussions on potential changes in the energy sector were a source of heated debate. Particularly from representatives of parties such as Democratic Revolution Party (PRD) and Morena, who voiced the significance of the oil nationalization and the *heroic* actions of Cárdenas who stood up against foreign companies. Hence any changes to the energy sector would be a *betrayal* to Cárdenas' legacy. The recognition on the significance of the oil nationalization was voiced by members of all parties, this shows a consensus in the value of the institutional heritage of the oil nationalization.

The main change in the discursive practices of resource nationalism is the shift from the antagonist figure. The historical discourse of resource nationalism presents foreign companies as the enemy of the people, who exploit domestic workers and allow foreign countries to benefit from domestic oil revenues. In the modern discourse, given that the oil industry is managed by the state-owned company Petroleos Mexicanos (PEMEX), the antagonist figure moved towards private investment, domestic included.

The modern discourse of resource nationalism hyperbolizes the benefits of state ownership and policies that enable strategies such as subsidies. These strategies allow the people to enjoy cheaper fuels and participate in the gains from domestic oil production. Congress representatives who show higher adherence to the resource nationalism discourse, argue that changes in the energy sector and allowing private investment would tarnish the legacy of the oil nationalization and be to the detriment of social justice.

The historical legacy of state ownership in the energy sector is at the core of the understanding of resource nationalism in the Congress. Cárdenas is represented in a mythical manner, as a hero who protected the nation from foreign exploitation and who deserves loyalty and admiration. The oil nationalisation of 1938 is therefore Cárdenas' legacy to the nation, and is the responsibility of the state to protect it.

The elements that construct the resource nationalism discourse emanated from the historical discourse. They include the understandings of sovereignty, state ownership and social justice. In the resource nationalism discourse, the political elites understand sovereignty as the decision-making capabilities of the state. Energy sources are regarded by the political elites as an instrument to deliver social justice. Finally, state ownership provides the decision-making capabilities over the energy sector to accomplish social justice. The resource nationalism discourse in the Congress can be interpreted as the protection of the

historical legacy of the energy sector. A legacy that consists of the decision-making capabilities of the state over energy resources, which should be used to deliver social justice.

1.4.3 How does the discursive representation of resource nationalism conflict with the discursive representation of climate change?

Moving forward to environmental policies, Mexico is a highly active country in the international community. Mexico signed the United Nations Framework Convention for Climate Change (UNFCCC) in 1992 and the Kyoto Protocol in 1998. The earliest precedent on domestic climate change policy was from the general law of ecologic equilibrium and environmental protection enacted in 1988, which was adapted in 2007 to include an official definition of the term climate change (Congreso de la Union, 2012). In 2012 the general law of climate change was issued, being the first domestic law specifically designed to address the challenges of climate change.

Climate change policy aims for an energy transition towards renewable energy and the reduction of greenhouse gases emissions. From the resource nationalism discourse, it is evident that political elites have internalized the need to protect and continue with a traditional approach of energy policy, due to the perception that fossil fuels are instruments to deliver social justice. However, this view conflict with the goals of climate change policy. At the core of this dilemma, the discursive representation of social justice in the resource nationalism discourse excludes climate change as an element that impacts social justice. Hence, the resource nationalism discourse competes with the principles of environmental justice and the goals of climate change policy.

The disparities between the principles of resource nationalism and climate change policy are broadened if we consider the origins of these norms and regulations. Unlike the early domestic origin of resource nationalism as a symbol of sovereignty, climate change policy in Mexico was adapted from international discussion in the last years. I argue that in

order for climate change policy to be treated as a priority and be fully implemented, climate change policy can be addressed with similar discursive practices used to institutionalize resource nationalism. Climate change is a substantial and complex issue; hence it is necessary to simplify the discursive practices to appeal to the masses. There needs to be a specific domestic value to the fight against climate change, this can be presented as a fight to keep a way of life. Individuals need to be compelled to care about this issue, political elites can express the importance of mitigating and adapting to climate change by talking about the risks for the Mexican people, such as climate change displacements or extreme weather events that would lead to the loss of peoples' homes and belongings. A challenge to overcome is crucial, given that climate change is a broad process with multiple variables, it is important to position the causes of climate change as an enemy to defeat. Fossil fuels can play this role by voicing the consequences of using fossil fuels and its impact in people's livelihoods such as health issues that arise from air contamination. The climate change discourse can gain more relevance with the inclusion of specific effects on people's lives.

The previous statements are examples from the shifts that can be addressed in discursive practices. It is important for representatives to discuss climate change issues in terms that appeal to individuals and their well-being, as well as to build the legacy for their children. If this were to be accomplished, it would strengthen the domestic internalisation of climate change as a problem.

1.5 Thesis Structure

The purpose of this research is to explore how resource nationalism in Mexico is posing an obstacle for climate change policy. In order to fully understand the complexities of this topic I divided this thesis into eight chapters plus conclusions. In the following paragraphs, I give an overview of the structure of this thesis and the contents of each chapter.

In the second chapter I discuss the theoretical and conceptual frameworks, with the objective of guiding the analysis of this thesis with the relevant literature. Firstly, I explore the central understandings of constructivism and its contributions to IR theory. Secondly, I explain my choice of theoretical approach and its suitability for this study. I continue this chapter with a conceptual framework, where I explain the most significant concepts in this thesis. I start with the explanation of nationalism and national identity, as well as resource nationalism, and state ownership. For each concept, I discuss relevant literature and reframe the understandings from a constructivist perspective.

In the third chapter, I present the methodological approach. I begin with a discussion of critical discourse analysis as a method, and continue with an explanation of the discourse historical approach. In the next section, I discuss the suitability of this method for constructivist research and specifically for analysing my research questions. I go forward with a description of the research procedures, including further details on corpus selection, collection and analysis. I finalize this chapter with considerations of scope, limitations, validity, and reliability.

In chapter four I explore the context of resource nationalism. Firstly, I review resource nationalism in Mexico and Latin America, as well as the domestic approach to NAFTA, in order to provide a geopolitical background on this topic. Secondly, I give an overview of the political system in Mexico and discuss the energy sector, including its structure and significant figures. I continue an overview of climate change policy, including its domestic and international precedents. I finalize this chapter with a discussion of the general law of climate change, its goals and instruments.

The fifth chapter is focused on the historical construction of resource nationalism in Mexico. I begin with a discussion of the colonial precedents of resource nationalism, then I move on to explain the instability during the times of the Mexican Revolution and the failure

to legitimate a political regime. I then proceed to examine the sociopolitical context during 1934 to 1940.

After providing the historical and sociopolitical context, I present the lexical and intertextual analysis. In this section, I describe my interpretation of the historical discourse. I divided the strings of discourse into three categories: official discourse, supporters' discourse and opposition discourse. I finalize this chapter with a critical analysis of the historical discourse. In this section, I use a constructivist lens to interpret the use of oil nationalization as a means to legitimise the political regime and end an era of instability and violence. I then explore how the oil nationalization evolved into an emblem for collective victory against foreign exploitation and became institutionalized as a symbol of sovereignty and part of the national identity.

The sixth chapter is focused on the contemporary discourse of resource nationalism. I focus on two presidential terms: 1994 to 2000 and 2000 to 2006. The purpose of analysing these specific terms is to gain understanding on the evolution of contemporary resource nationalism, as well as the precedents and surge of climate change policy.

The first analysis from 1994 to 2000 is the term of president Ernesto Zedillo. In this section I discuss the sociopolitical context focused on the main events of the time, such as, the uprising of the Zapatista army of national liberation (EZLN), the North American Free Trade Agreement (NAFTA), and the advances in environmental policy as precedent for climate change policy. I follow with a lexical and intertextual analysis of the resource nationalism discourse and move on to provide a critical analysis of the discourse where I use the theoretical framework to guide the analysis. Throughout this analysis I explain the links between the institution of oil nationalization and sovereignty. I discuss the particulars on the perception of historical resource nationalism as a political victory, and the perceived threat of NAFTA.

I continue with the analysis of the presidential term of Vicente Fox from 2000 to 2006. I discuss the main events of the sociopolitical context, including the rise to the presidency from the National Action Party (PAN) after over seventy years of uninterrupted rule of the Institutional Revolutionary Party (PRI). I follow with a portrayal of the energy and environmental policy. Subsequently, I deliver the lexical and intertextual analysis of the resource nationalism discourse from this presidential term and conclude with a critical analysis of this term.

In the seventh chapter, I proceed to analyse the contemporary resource nationalism discourse in the presidential term of Felipe Calderon from 2006 - 2012. The analysis of this presidential term is particularly important given that climate change became an increasingly pressing issue in the global agenda. As a response from the Mexican government, the general law of climate change came into action. It was the first of its kind in the country and it presented a dilemma between the intensive use and production of fossil fuels promoted by resource nationalism and the achievement of the goals of the general law of climate change. The sociopolitical context provides a background to the highly contested elections of 2006 and the dynamics of the political actors involved. I discuss the energy policy and the progress made towards climate change policy. I continue the chapter with a lexical and intertextual analysis of the resource nationalism discourse. I conclude with a critical analysis based in the constructivist framework where I discuss the issues found in the resource nationalism discourse, such as the meaning of state ownership as a symbol of national identity and the mythified idea of the historical resource nationalism. I explore the role of origin (domestic vs. foreign) in norms and regulations, to understand the discursive institutionalization of resource nationalism and climate change policy.

In chapter eight I present a discussion of resource nationalism and climate change policy. I begin by giving an overall interpretation of the construction of resource nationalism.

I give an overview of the historical resource nationalism discourse and follow with an outlook of contemporary resource nationalism discourse. I then proceed to interpret how the idea of resource nationalism was originally constructed and how it has changed throughout time. I address the differences between the contemporary and historical discourses, as well as how the resource nationalism discourse has been appropriated and adapted to the sociopolitical context. I continue this chapter by providing a discussion of the dynamics between resource nationalism and climate change policy. I examine how the changing perspectives of resource nationalism can impact climate change policy, particularly the general law of climate change. I assess the disparities on internalization of norms and regulations that are domestically originated such as resource nationalism, and regulations that are externally originated such as climate change policy. I finalize this chapter with an account of the discursive lessons from resource nationalism that can be learned and applied to climate change policy.

In the concluding chapter, I provide my final observations on the relationship between resource nationalism and climate change policy. I discuss the main argument of my research, my contribution to the body of knowledge and its significance. I begin with a discussion of the main ideas from this thesis, such as the construction of resource nationalism and the reconstructed idea of resource nationalism among political elites. I move on to review the impact of resource nationalism in climate change policy and interpret the discursive lessons from resource nationalism. I conclude this chapter with a commentary on the scope and limitations of this thesis, as well as further lines of enquiry for future research.

Conclusions

In this introduction, I provided an overview of the thesis and the importance of this research. I justified the significance of understanding how resource nationalism pose an

obstacle for climate change policy in Mexico and how resource nationalism was constructed, institutionalized and reconstructed. I presented the research problem and research questions and explained the argument that I constructed to answer my research questions. I outlined the original contribution of this research, as well as the structure and content of the chapters in this work. In the following chapter I present the conceptual framework that discusses the main concepts used in this thesis.

Chapter 2. Conceptual Framework

In chapter one I introduced the research questions, their significance, and the argument I developed as a result of this research. In this chapter I provide a conceptual framework of the most salient concepts of this thesis: neo-extractivism, nationalism, national identity, resource nationalism, social justice, environmental justice, and state ownership. For each concept, I provide an examination of relevant literature and follow with the reframing from a constructivist perspective.

The production of knowledge involves the conceptualisation and organization of the world around us, which is a way to transform chaos into a normalized reality. With the use of language, we provide points of reference to measure and organize reality. Metaphors serve as the point of reference in communication. When a metaphor achieves a sense of abstraction, it becomes a concept. We then, as society, reproduce concepts as signalling points to understand and give meaning to our perceived reality (Onuf, 2017). In this section I provide a conceptual framework from a constructivist point of view, in order to determine a point of reference for the analysis of resource nationalism in Mexico. In the following section I begin with a discussion of post-neoliberalism in Latin America in order to place my study in the broader literature.

2.1 Post-neoliberalism in Latin America

There is not a homogeneous set of policies that can describe a post-neoliberalist regime. The regional diversity on resources and leadership makes every case unique, the theoretical similarities rely on the *post* of post-neoliberalism. In some cases, it can be described as an anti-neoliberal alternative, such as the cases of Bolivia, Ecuador, and

Venezuela. Ruckert et al. (2017) argue that post-neoliberalism is not a clear rupture from neoliberalism, rather a break from certain policy aspects and inclusion of elements, such as social spending, citizen participation, and neo-extractivism. Alongside reshaping the state-market relationship, post-neoliberalism emphasised politics of identity and recognition. The democratisation process in Latin America allowed previously neglected groups, such as indigenous groups to participate in the political process. They demanded ordinary people like them to become leaders. This was an important factor in the rise of leaders, such as Evo Morales and Rafael Correa (Grugel and Rigirozzi, 2012).

Post-neoliberalism in Latin America combines elements of neoliberalism, such as export-based economies, with mechanisms of social inclusions and welfare. Post-neoliberalism is also referred to as the pink tide and it started with the election of Hugo Chavez in Venezuela and the rise of left and left of centre governments in Latin America. Latin American countries aim to increase the role of the domestic market in the economy. Grugel and Rigirozzi (2012) argue that the pink tide is rooted in local traditions and communities that demand a change in the relationship between the state and society. They argue that at the core of post-neoliberal governments is an attempt of the state to be responsive to social responsibilities.

The economic trends in post-neoliberal governments is to reshape the relationship between the state and the market, where the state is the main agent for development. A mechanism to achieve development is to increase social spending and social programmes. However, this spending is often reliant on the income from the extraction of natural resources. Neo-extractivism refers to the reliance on the extraction of natural resources to create a surplus for redistribution (Ruckert et al., 2017). Nationalisation is a component of neo-extractivism. However, there is a question of whether nationalisation is a response to previous neoliberal policies or a government's populist rhetoric (Veltmeyer, 2012). Post-

neoliberalism comes from a utopian project of change, but maintains certain principles of neoliberalism. The main divergences are the control over market processes, means of production and decision-making to regain social control. Yates and Bakker (2014) argue that resource nationalism challenges neoliberalism through neo-extractivism. However, with this approach the country remains dependant on global markets.

Pink tide governments were able to increase their public spending through tax reforms, extractivism, and due to the growth of China and their demand for commodities produced in Latin America. The decline in poverty can be attributed to the increased demand of commodities from 2002 to 2012. However, the vulnerable sectors of the population have become dependent on the state in order to be protected from poverty (Grugel and Riggirozzi, 2018).

Ruckert et al. (2017) highlight a conflict between neo-extractivism and environmental policy in post-neoliberal governments. While pink tide governments claim to have a relationship of respect with nature, there is a high economic reliance on the extraction of natural resources to fulfil their social policies. This conflict indicates a potential unsustainability of the post-neoliberal approach.

2.2 Neo-extractivism

Resources and states are socially constructed from a socio-natural relationship. The territorial and institutional configuration determines how natural resources are organised and managed (Bridge, 2014). Both scarcity and abundance of a natural resource can be used as part of the construction of the nation, such as the case of water scarcity in Israel (Alatout, 2008). Historical events are highly relevant because they shape contemporary resource-states

and environmental policies. This is particularly important in Latin America, where the cultural politics of resource nationalism shape resource management.

In order to understand neo-extractivism, we need to look at its origins. Brand et al. (2016) argue that Latin American history is tightly linked to extractivism. Colonial extractivism from the 16th to 18th century marked the establishment of this practice, where regions were valued according to the commodities they could provide. The second phase was extractivism of liberal capitalism from 1810 to 1930, when the economy was booming through free trade of natural resources. The next stage according to Brand et al. was Extractivism of Peripheral Fordism from 1930 to 1970. This phase was characterised by crisis, the rise of the import substitution model, and stronger state intervention. From 1970 to 2000 there was a shift towards a neoliberal approach, where development was based on an increasingly globalised market economy. The current phase of neo-extractivism started around the year 2000, where there was an increased demand of natural resources and the states increased their dependence on extractivism. Neo-extractivism was at its highest from 2000-2010 due to the demand for commodities, but it suffered a deceleration from 2010 onwards.

Classical extractivism was based on economic benefits of overexploitation of natural resources. Neo-extractivism refers to the post-neoliberal form developed in Latin America, where the extraction of resources is accompanied by a nationalist and anti-imperialist discourse. The neo-extractivism discourse justifies the use of natural resources to fight poverty and inequality. Gudynas (2013; 2015) identifies Mexico as a form of classical extractivism which perpetuates neoliberal policy such as deregulation and privatisation. However, as I discuss in this thesis, the energy sector in Mexico particularly the oil industry shows continued nationalist policies since the oil expropriation in 1938. Mexico is a unique case of extractivism. While the rise of nationalist and anti-west discourses became an element

of Neo-extractivism in Latin America, these kinds of rhetoric have been present in the Mexican energy discourse since 1938.

Neo-extractivism has emerged as means of development, it is based on an economic foundation but leaders include a narrative of sovereignty and legitimacy of the government. Criticisms of neo-extractivism are based on the social and environmental contradictions of this approach to development. While Mexico's reliance on the production of raw materials is still high, Mexico is diverting from this trend by diversifying its sources of income. Some of the problems arising from neo-extractivism include a dependency on non-renewable resources and growth of global demand. This approach to development rather than tackling the roots of social problems, only aims to shares the spoils of extractivism (Burchardt and Dietz, 2014).

Extractivism is legitimised by emphasising the social benefits and minimising its environmental impact. The reproduction of extractives discourses provide coherence to the strategies of exploitation of nature resources. Predatory extractivism in Latin America is an unsustainable practice that affects biodiversity, local economies and indigenous populations. Gudynas (2014) argues that this kind of extractivism has been perpetuated with the use of discourses with scientific, environmental, social, political, and economic arguments. Scientific elements of the discourse argue that the impacts can be identified, mitigated or averted through the effective use of science and technology. These arguments when applied to environmental impacts, fail to acknowledge the lack of a complete understanding of the structure and dynamics of ecosystems. Therefore, it is virtually impossible to successfully restore an ecosystem once it has been damaged, such as in the case of open surface mining.

The variety of governance models in Latin America creates a diversity of environmental standards and management. States exercise sovereignty over resources in a variegated way according to the interactions between the state and non-state actors, as well as

other variables, such as extraterritorial control and international rule-enforcement (Bridge, 2014). An element used to legitimise extractive industries is to make environmental regulation more flexible, which means to reduce the standards and protection of the environment. Furthermore, governments can limit the resources available to environmental agencies, which in result reduces their capabilities. Petras and Veltmeyer (2010) agree that the environmental crisis is driven by overproduction and accumulation of wealth. They argue that the economic system allows an over exploitation of resources with minimal state regulation.

The social arguments to legitimise extractivism emphasise the benefits of the extractive industries with strategies that aim to reduce poverty through employment and local investment in schools, hospitals, and social programmes among others. However, the discourse on the social advantages of extractivism fails to acknowledge its limitations and real efficacy. This type of discourse is often used as a justification and a shield for the government from citizens' demands. Economic arguments are based on the premise that extractivism brings economic development. However, neo-extractivism creates an economic dependence on the extraction of natural resources, in order to secure surplus for redistribution (Ruckert et al., 2017). In terms of environmental impact, states make the argument of economic compensation to local communities. However, the money directed towards the communities does not restore environmental degradation (Gudynas, 2014).

Gudynas (2016a) argues that there is a contradiction between the global environmental commitments and the real national environmental policy. This is due to the basic political ideologies of a separation between nature and society, as well as having progress as a main goal to achieve. In order to achieve political change, academic knowledge should address the cultural aspects of development ideas, through interdisciplinary efforts which should be available to the public. Gudynas (2016b) argues that south-south cooperation promotes development. However, it is limited due to the main premise of

growth-based development, which continues with practices such as extractivism. Since 1970, there was a focus on economic growth while environmental policy was not very relevant. Once environmental discourses became more salient at the global level, extractivism was already well established. Therefore, representation of environmental discourses was reframed by some governments as anti-oil, or anti-mining, in order to establish a negative connotation. The underlying issue of this conflict relies on the representation of value, where humans are represented as valuable while nature is represented as a compilation of objects (Gudynas, 2017).

Governments in Latin America place crisis as a distant issue that is not going to affect them. Therefore, they continue with extractives practices. Extractivism creates a vicious cycle where the extractive industries have social and environmental impacts for which the state compensates the people. Then the compensation requires continuation of extractive practices to keep compensating the people for the impact caused. However, the roots of social and environmental problems are not addressed (Gudynas, 2012).

The majority of debates on neo-extractivism focus on rent-theoretical approaches, but do not acknowledge the dialectics on the use of resources and the social relations of recognition, representation, redistribution, and politics of domination. However, some scholars adopt a political ecology approach which provides a toolkit to analyse neo-extractivism and identify the changes in power relations in terms of identity, distribution, and social practice. By inquiring into who legitimises the use of land, we can identify whether legitimacy comes from the nation as an imagined community or from local communities who practice territorial self-determination (Burchardt and Dietz, 2014). The extractives discourses are tied to the national interests and represent the essence of the nation or the people. The discourses are often simplified and have a religious component, such as a divine right to the

land. They normalise extractive activities and represent them as something that is necessary (Gudynas, 2014).

Gudynas (2016c) explores the discursive representation of oil in Latin America. With a predominant Christian population, Latin American communities often use religious analogies to portray social processes. Gudynas argues that local and indigenous communities represent extractive industries as the devil, to acknowledge the negative social and environmental impact of the industry. Similarly, governments with state owned extractive industries portray international companies in the same manner. The negative aspects of extractivism are often erased from the discourse while emphasising the positive aspects of development. This kind of discourse silences the voices of local and indigenous communities who are impacted by extractivism.

2.3 Nationalism and national identity

Nationalism is a widely studied concept. However, there are many interpretations, instead of one absolute construct. Smith (1991) explains the different approaches to the concept of nationalism. According to Smith, the meaning of nationalism can represent the process of constructing and maintaining the relationship between the nation and the state. Smith considers other aspects that can be used to analyse the meaning of nationalism, such as sense of belonging, symbolism and ideology, among others. The first point, sense of belonging, can be explained as a national consciousness with a desire for prosperity for the nation. The second point, symbolism, can include visual and verbal expressions from slogans to ceremonies, which are linked to a national sentiment. The final point, ideology, requires a deeper analysis. However, in terms of nationalism, ideology represents the history, identity and future of a nation.

Gellner (1964) considers nationalism a construct that is based on the congruency between the national unit and the political aspect. According to Gellner, nationalism creates nations in communities that share cultural similarities: “Nationalism is not the awakening of nations to self-consciousness; it invents nations where they do not exist” (Gellner, 1964, p.169). However, Anderson (1983) provides a different interpretation of nationalism. He argues that nationalism is the product of an imagined political community: “It is imagined because the members of even the smallest nation will never know most of their fellow-members, meet them or even hear of them, yet in the minds of each lives the image of their communion” (Anderson, 1983, p 6). According to this, an important aspect of nationalism is the shared idea of a similar identity among the community members. Cederman (2002) describe nationalism as a community that shares a specific ideology and possess a territorial self-determination to a certain extent. Cederman identifies the two main elements of nationalism as a national unit and the state. Breuilly (1985) identifies three components that define nationalism. The first element is the nation, which states that there must be a national unit with a distinctive character. The second element represents priorities, the national interests and values are more important than any other. The last element is sovereignty; the nation must be independent and self-determined.

Based in constructivist theory, I outline three basic attributes that aid me define nationalism from a constructivist perspective: nation, state, and culture. Firstly, the nation can be defined as a community that reproduces and constitutes a specific set of social structures. Secondly, the state represents the corporate structure of the community. This corporate structure has been validated by the individuals and acknowledged by the international community to be self-determining and use cohesive power to enforce the reproduction of certain social structures and individual behaviours. The last element is culture. This concept expresses the individual’s acknowledgement and internalization of specific interests, ideas,

and values, which are represented by the corporate structure of the community. The individual then considers the specific interests and values to be shared by the rest of the imagined community. According to the previous elements, nationalism can be described as the process of acknowledgement, internalization and reproduction of specific ideas, values, and interests in the social imaginary, which are simultaneously represented by the social corporate structure.

Within the ideational aspect of nationalism, I incorporate the concept of national identity. While national identity can be conceptualized separately, I want to frame this concept as a key aspect in the understanding of nationalism. Anderson (1983) presents the sense of belonging or *We Sentiment* as a central attitude in national identities. Each individual has a unique experience as a human being, however a group of individuals can have similar experiences relating to their surroundings, understandings, and day-to-day practices, such as symbols, history, and language. These similar experiences provide a base to imagine the perspective of other members of the group, even when they do not have immediate tangible evidence or knowledge of the rest of the individuals in the community. A constructivist interpretation of national identity can be framed as the cumulative effect of reproduced similar understandings, norms and practices; within a group that is established in a geopolitical space. This cumulative effect is perceived as a synchronized understanding of the imagined community and constantly constructed and reconstructed through communication and other means of socialization.

National identity can be approached as a dynamic process, rather than only an abstract understanding, given that if analysed at different points in history, social practices, norms, and understandings fluctuate over time (Wangler, 2012). National identity is continuously changing through the production of knowledge, understandings, and social practices. Change can occur through communication with individuals inside or outside the group, as well as

from gaining understandings from the surroundings and other aspects of the material world. Documentation serves as a tool to maintain knowledge and understandings across time, which provides us with a window to observe the past. A national identity is cumulative in the sense that it is built on the knowledge and understandings of previous generations throughout time. Mobility also creates further knowledge and understandings across space. Wright (2011) explores the role of diversity in the delineation of national identity and finds that there is a positive correlation between rapid increase of cultural and ethnic diversity and the sense of nationalism. This provides an essential element to understand national identity and other social concepts, which are the effects of time and the rate of change in variables such as immigration and ethnic diversity.

The process of constructing shared imaginaries in Latin America was defined by colonialism. Mexico as the rest of Latin America has a political and economic system that is rooted in European ideals. The imposition of these structures and set of values simultaneously silenced the groups that previously inhabited the American territory. Grillo and Sharon (2012) present the case of Amazonian people in Peru. They discuss the marginalisation of the Amazonian people during the construction of the nation. Coastal mestizos remain at the core of the national identity, while Amazonian people are marginalised and their voices are silenced. The state played a central role in the representation of the Amazonian people as the other. Since colonial times Amazonian people were portrayed as savages whose way of living was not adequate, while coastal population was Europeanized. The process of *mestizaje* was not only a cultural integration but an imposition of an economic and political model.

With the establishment of land reforms, the state continued with a separation between subject and space. This separation allowed to construct a perception of the Amazon as an empty territory to be used by the state and silenced the voices of the people who already

depended on that land. The separation between subject and land is a construct acquired from colonial imposition, which values the land according to the economic potential. Therefore, the valuation of the environment remains established in economic terms.

The understanding of national identity as an ideational dynamic process within the phenomena of nationalism, provides a conceptual cornerstone for the analysis of the construction of resource nationalism. The set of values imposed during colonialism played a key role in the construction of the nation. It established whose voices were going to matter and the relationship between society and nature.

2.4 Social Justice

The conceptualisation of social justice revolves around the social understanding of difference and sameness. Two main debates advanced the understanding of the meaning of social justice. The first is the procedural/contractarian approach versus an outcome-based approach. The second enquires into the dynamics of social justice through redistribution, recognition, or both.

John Rawls' *Theory of Justice* (1971) establishes that the basis of a just society from a procedural/contractarian approach. He argued that a just society is the result of the individual's choices. Rawls worked under the assumption of a state where individuals are free, equal and independent. This is a problematic assumption that is addressed by Nussbaum (2006) and Sen (2007; 2010) who critique the indifference of the procedural approach to the real circumstances of people. Nussbaum (2006) shifts the understanding of sameness in social justice from procedure to outcome. By shifting the understanding of sameness Nussbaum aims to address the realities of marginalised sectors, which are overlooked by the procedural approach. Identities are particularly relevant in social justice. Sen (2007) argues that the

division system, which categorises people in a narrow set of identities, undermines the pluralities of society and becomes a challenge for social justice.

Fraser (1995; 2005; 2003; 2007) encompasses social justice in a three-dimensional approach of redistribution, recognition and representation. She argues that all elements are necessary to achieve social justice. Fraser acknowledges the identity-based approach but questions whether it can be counterproductive in protecting social differences. Honneth (2003) critiques Fraser's use of identity in social justice because it narrows the reach of social justice towards groups that are vocal and already recognised. Recognition is at the core of Honneth's approach. He argues that social groups who do not have the capabilities to make themselves visible are vulnerable to degradation and disrespect. In a similar manner to Sen's approach, Honneth rejects the notion of social justice as a unique transcendental concept. He argues that social justice should be grounded in people's realities.

Recognition is highly relevant as a means of acknowledging and remedying social injustice. Socioeconomic redistribution was the norm to achieve social justice. However, recognition of differences, such as ethnicity and gender have become more salient in recent years. From a redistributive point of view, exploitation is perceived as the core of injustice, while from the social recognition perspective cultural dominance is the root of social injustice. Fraser (1995) argues that struggles from recognition are also increased by economic inequality, therefore justice needs both, redistribution and recognition.

Injustice through cultural domination refers to being constrained to social patterns of communication and interpretation from an alien and/or hostile culture. Harmful social patterns perpetrated by a hostile culture, such as non-recognition, disrespect, or "being routinely maligned or disparaged in stereotypic public cultural representations and/or in every day interactions" (Fraser, 1995, p71) represent injustice from cultural domination. This notion is particularly relevant to this thesis. From a constructivist perspective, communication

and social learning are fundamental in the constitution of identities and structures (Onuf, 2017).

In the case of Latin America, colonialism was an example of hostile cultures establishing a set of values and harmful social patterns in colonial territories. Those harmful social patterns were later perpetuated by postcolonial regimes through social learning and communication. Colonialism essentially established the mechanisms that postcolonial states are bounded to (Ferguson, 2006). During colonial times, Latin American regions were valued according to the commodities they could provide (Brand, et al., 2016). These patterns were then perpetuated through social learning and internalised as part of the imagined shared identity of the nation. I argue that the valuation system through the provision of commodities was a fundamental element in the construction of the current extractivism structures in Mexico.

Honneth (1992) argue that the main negative effect of injustice of recognition is the lasting impairment to develop a positive sense of identity in an intersubjective context. This argument can be applied to the shared understanding of the nation. It can give an interpretation of how Latin American countries were challenged to develop a positive sense of national identity because of their colonial roots. Fraser (1995) addresses the issues of remedying injustice of recognition. Given that recognition is essentially ideational, the solution to injustice would require cultural change. Affirmation and transformation are two means to address injustice. Affirmation aims to correct outcomes of inequity without addressing the roots of inequality while transformative action aims to address the underlying frameworks of inequality by changing the value structure. Transformative solutions would result in a shared sense of belonging and shared identity. Transformative political action in a globalised world addresses misframing and misrepresentation without being constrained by

state-territorial space. This kind of action reveals injustices that are often overlooked by other social justice theories (Fraser, 2005)

The arguments developed by Fraser and Honneth are particularly relevant in this thesis. The analysis conducted in this research aimed to interpret the understandings of policy makers around the resource nationalism discourse. Social justice is a concept widely used in the resource nationalism discourse. However there seems to be a tension between means and objectives. Policy makers address social injustice through redistribution but the underlying approach of injustice indicates a need for recognition. This is particularly salient when policy makers emphasise the importance of sovereignty and social justice. In this thesis, I primarily focus on recognition as the focus of social justice but acknowledge redistribution and representation as necessary elements of social justice.

2.5 Environmental Justice

The concept of environmental justice aims to address the fair distribution of environmental benefits and burdens. The distributional approach to environmental justice has the potential to address needs, such as ensuring that vulnerable and marginalised groups do not become systematically affected by environmental challenges (Walker, 2010). However, the concept of justice is represented as a distributional issue. In a similar manner to the debates on social justice, the approach to understand environmental justice raises questions of justice for whom? Justice of what? And how can we achieve environmental justice? The distributional approach might aim to share the burdens of environmental problems, but it would not necessarily address its causes (Walker and Bulkeley, 2006). In terms of equality of what? The answers could encompass access to resources, opportunities, goods, capabilities,

or welfare (Smith, 2000). Alternative approaches have included justice as recognition and participation.

Nevertheless, there is still a tension over how to address equitable responsibilities to tackle global environmental problems, such as climate change. Critiques of sustainability approaches argue that soft forms of sustainability consider the protection of the environment in economic terms, which does not acknowledge the intrinsic value of nature. However, stronger approaches of sustainability do not always acknowledge the impacts on social equality. The approaches to sustainability tend to pursue separate environmental and social goals, which neglects the inherent interactions between both aspects and their implications for justice (Walker and Bulkeley, 2006). This tension is particularly relevant to this thesis. The resource nationalism discourse showed an emphasis on using energy resources to pursue social justice. However, the understanding of social justice does not acknowledge the socio-environmental interactions and implications.

Walker (2009) mapped the dynamics of how the environmental justice frame has been globalised. He argues that the rhetoric and language of environmental justice was globalised in a *horizontal* manner through reproduction, diffusion and contextualisation in different countries. The environmental justice frame also had a *vertical* expansion which addresses the issues that cannot be managed within the borders of a nation. The scope of these issues need to be addressed through international cooperation. The two processes contributed to a global expansion of the language surrounding environmental justice. However, there are still significant tensions in the discourse.

A main issue is the focus over achieving justice for people in the environment rather than gaining justice for nature (Agyeman et al., 2003; Low and Gleeson, 1998). This focus has the potential of neglecting and justifying the irreparable damage that can be done to ecosystems and biodiversity by taking an anthropocentric approach. A further conflict comes

from the origins of environmental justice from grassroots activism. The early conceptualisation developed a narrow formulation of environmental justice. This formulation was focused on pollution, waste, and risk, as well as assigning responsibility to industry and corporate actors. This approach established environmental justice as a distributional matter and overlooked the need for transformative action. The adaptation and increased scope of environmental justice has allowed an inclusion of issues such as indigenous rights, which allows for a multidimensional approach to justice but it also has the potential to reach much further (Beckman and Page, 2008; Paavola, 2008; Page, 2007). In this thesis, I address these tensions by analysing the ideational understandings of justice. I argue that policy makers focus on social aspects and neglect the environmental interactions and implications.

2.6 Resource nationalism

Understanding of resource nationalism has increased in recent years. However, its conceptualisation has been mainly from a materialist point of view, which is focused on the economic aspects of resource nationalism rather than the ideational ones. In the following discussion, I explore the perspectives of resource nationalism and frame this concept from a constructivist interpretation, taking into account the historical and ideational elements. Resource nationalism has a diversity of forms influenced by elements, such as economic profits, scarcity, market prices, and national identity. The term encompasses the varieties of relations that a government has in the production of natural resources. Pryke (2017) argues that resource nationalism can be observed in protective resource policies through a level of equity participation or taxation. This understanding illustrates that most governments have a degree of resource nationalism.

Pryke (2017) divides the academic understandings of resource nationalism into four main approaches. The first understanding of resource nationalism is when states intervene to control natural resources in order to enhance sovereignty and the patrimony of the nation. This approach increases the economic and political power of governments, which can be used when negotiating with foreign actors. A second approach is economic nationalism, which is based on market dynamics and states aim to control the profits of the resource. A third understanding of resource nationalism is when states restrict the access to certain resources in order to impede certain actors to participate in the productive processes or to reduce exports of the resource. A final understanding recognises the identity and justice elements of resource nationalism rather than reducing its dynamics to an economic approach (Childs, 2016; Haislam and Heidrich, 2016). This thesis contributes to the fourth approach in the resource nationalism literature. In this thesis I provide a case of study that addresses resource nationalism as a crucial element in the construction of the Mexican national identity.

Koch and Perreault (2018) understand the resource nationalism discourse as a political question about the management and distribution of the rents obtained from natural resources. They also include the understanding of a shared belonging of natural resources, they argue that nationalism is expressed through the ownership of nature. If there is a strategic economic or political relevance of a natural resource, resource nationalism can be present in non-extractive or renewable resources. They identify natural resources, nationalism, sovereignty and territory, as the main concepts around the resource nationalism discourse. Resources are constituted in relation to social structures. Given that territory and states are bounded together, resources mutually constitute states.

According to Mares (2010) the concept of resource nationalism can be applied to different natural resources such as woodlands, minerals, oil and gas among others. Mares' framing of resource nationalism considers natural resources as national heritage, which

should be used to benefit the nation. This concept is particularly important in the Mexican energy sector, where hydrocarbons are considered to belong to the nation. Mares argues that the main goal of resource nationalism is to transform the revenues of natural resource exploitation into social programs and other mechanisms that would represent progress or increased wellbeing for the nation.

Resource nationalism is context-dependant; it has individual characteristics in each country, but they can be classified according to their similarities. Bremmer and Johnston (2009) identify four categories of resource nationalism: revolutionary, economic, soft and legacy. The first type of resource nationalism is revolutionary resource nationalism. This kind of resource nationalism occurs in countries that also have political and social unrest, making resource nationalism only a feature in the bigger picture. Revolutionary resource nationalism is unfavourable for international investment, given that is often accompanied by political and social instability. The second category is economic resource nationalism, which involves greater control over natural resources. In this category, environmental issues can be used to renegotiate contracts. Sarsenbayev (2011) provides an example of economic resource nationalism in Kazakhstan, where the main trends have been an increased taxation in the oil industry and a stronger fiscal regime that would provide the government with the tools to increase its participation on the revenues of oil. The third type is legacy resource nationalism, which has a cultural component, such as the conjunction with national identity. Legacy resource nationalism is deeply rooted in traditions and it is difficult to change, as in the case of Mexico. The fourth and last kind is soft resource nationalism, which is present in developed countries where is mostly seen through increased taxes or royalties that are applied through institutional means.

Wilson (2015) offers a different categorization of resource nationalism. He presents a materialist approach, and argues that the rise on resource nationalism observed in the last

years, is driven by economic and political interests. Wilson classifies countries that present resource nationalist characteristics in three categories: rentier, developmental, and liberal market. Rentier countries base their economy in the profits from their resources, which are often controlled by the state. Developmental countries aim to advance industrialisation through intervention policies in the exploitation of natural resources and finally liberal market economies use taxation as means to benefit from the production and use of natural resources. However, the previous categories are based in economic and political contemporary interests, without acknowledging the relevance of the sociopolitical and historical contexts.

Arbatli (2018) offers a conceptualisation of resource nationalism based on the business-state relationship. She contributes to the economic perspective of resource nationalism where natural resources are exploited in a spectrum of state-business control. Arbatli identifies regulatory measures and taxation as part of the determinants of resource control. While the analysis encompasses the economic factors of resource nationalism, she acknowledges the variables of identity, nation building, and sovereignty.

Childs and Hearn (2017) argue that resource extraction maintains a strong link with imaginaries of progress and growth. In an attempt to reduce inequalities, states increase their engagement in export-led growth based on resource extraction. Neo-extractivist nations follow the premise that an efficient use of abundant resources would address the paradox of growth coexisting with poverty. This is often pursued through a state's narrative of legitimacy to act as an agent of development with a forward-facing approach. Click and Weiner (2009) refer to resource nationalism as the control of the state or dominance over natural resources. In this conceptualization, the government intervenes in resource intensive industries to protect and enhance its national heritage and sovereignty. Click and Weiner consider that

foreign oil companies in resource nationalist countries have a greater risk mainly because of the rejection of foreign exploitation of natural resources.

In theory resource nationalism can have a socially driven purpose, where revenues generated from natural resources are used for social development, nonetheless this can be complex to deliver. This argument can be exemplified with the case of PEMEX in Mexico. The complexity is underpinned by the size of the industry and the fact that the state's dependence on oil revenues gives the national oil company extensive political power. Alongside the pressure from PEMEX's labour union, the management of the industry relies on political aspects rather than merit, which make the efficiency of the industry drop, thus reducing the capacity to generate profits that can be used for social purposes.

The ideational understandings of resource nationalism connect the element of anti-colonialism where former colonial states reclaim the rejection of foreign exploitation. In his analysis of resource nationalism in sub-Saharan Africa, Andreasson (2015) acknowledges the historical, sociopolitical, and contextual differences in the resource nationalist approach in Nigeria, South Africa and Mozambique. He recalls as a main example of resource nationalism the Mexican oil nationalisation of 1938, after which the first national oil company was created: PEMEX. Andreasson establishes a key argument for the construction of resource nationalism with a postcolonial perspective:

Nationalisation may also serve to enhance the legitimacy of post-colonial governments that are thus seen as doing something concrete to rectify exploitative relationships between their own societies and the former colonial powers in which many of the international resource companies are headquartered (Andreasson, 2015, p313)

Childs (2016) looks at resource nationalism from a geography perspective. He discusses the imaginaries that construct resource nationalism, including the differences in perception of resource nationalism found in western countries, where resource nationalism is acknowledged as legitimate and valid while resource nationalism in developing countries is

described as a dangerous political rhetoric. With a parallel outlook, Sikri (2010) argues that in energy geopolitics the main consumers of oil are not necessarily producer countries. Hence consumer states try to appropriate the land and resources of developing countries. This approach has an effect in resource rich countries to perceive international oil companies as predatory. This perception causes the resource rich state to protect their resources and shift towards resource nationalism. Childs points out the ambiguities of resource nationalism, when extraction occurs beyond the nation and what is considered to be legitimate, such as offshore extraction or the debate regarding drilling in the arctic.

Resource nationalism is not a homogeneous concept that can be generalized. Instead it is important to understand the particular political and historical context of each country to fully comprehend the dynamics of resource nationalism. Lange and Kinyondo (2016) present the case of Tanzania, drawing primarily in the mining sector. They acknowledge the importance of the political and historical context. Lange and Kinyondo found that working conditions and industry practices regarding local content are key aspects in Tanzania's resource nationalism. In the analysis of resource nationalism different variables need to be taken into account, such as means of production (public vs. private companies), distribution of rents (domestic vs. foreign), historical, economic and sociopolitical context.

From a constructivist point of view, based on the case of Mexico, resource nationalism can be reframed as: A social construct where the exploitation of a particular natural resource has a differentiated set of norms and regulations for two collectives (foreign vs. domestic or public vs. private). Resource nationalism materializes when the state claims legitimate ownership of the production, use or/and distribution of benefits and revenues of the natural resource. The state claims legitimacy by institutionalizing collective interests such as social or economic development to construct a resource nationalism discourse. The legitimised rights claim to fulfil a specified purpose that benefit the collective. The term

collective, can be interpreted as the state's discursive representation of the nation. The term *others* can be understood as foreign nations, international oil companies, domestic private sector or individuals.

2.7 Energy nationalism

Within the conceptualisation of resource nationalism energy nationalism is a variant that particularly focuses on energy resources. This variant is particularly salient due to the strategic importance of energy resources in the social and economic development of a nation. Political elites play a key role in the ideational and material understanding of energy nationalism. De Freitas Peigo and Gaspar Ruas (2015) explore energy nationalism through the relationship between the nation-state and oil companies. Energy nationalism is often understood in the literature as a degree of state ownership over energy resources. They identify oil nationalism with special characteristics that differentiates it from other forms of resource nationalism. Specifically, the strategic political importance for the economy and the military.

Historically, oil was fundamental for developing military power through activities, such as the transportation of troops. Oil has also been central in the development of society, from the development of industry to the urbanisation of cities. De Freitas Peigo and Gaspar Ruas argue that energy nationalism is pursued because of its relevance for military, industrial and social development. As well as the accumulation of wealth generated through taxation or the appropriation of the industry. Mabro (2008) argues that oil was used as a weapon in international relations during the 70s. Given the high demand of oil at the time, countries with large reserves were not as easy to embargo. This gave producer countries an edge in the international arena. Similarly, terrorism is perceived as a threat to energy supplies, which

constitutes a motivation for the international community to intervene in countries with oil reserves.

Mares (2010) defines two types of resource nationalist actors in the resource nationalism analysis of a given country. The first type is the statist, who promote government intervention. The second type is the reformers, who promote effective government regulation of private actors. A resource nationalist, according to Mares, assumes that an energy resource has a given value of belonging to the nation and is not only the one determined from the market. Mares understand the objective of resource nationalism as the maximization of rents in order to benefit the nation. He argues that there are many variants of resource nationalism, which depends on factors such as inclusiveness, innovation, risk acceptance and competitiveness. Energy policy appears to be dependent on the market conditions and the rents generated. The less competitive a political system is, the higher the level of resource nationalism. Political leaders also play a key role in resource nationalism, depending on its level of innovation and risk acceptance. If the leaders are not innovative and do not accept risk they will stick to traditional policy positions and will give a greater value to history.

The dynamics of resource nationalism can be described as cyclical (Stevens, 2008; Joffe et al., 2009; Vivoda 2008). Vivoda argues that the economic importance of the oil industry has produced a petro-political cycle developed in the past century due to the conflict-cooperation dynamics between states and oil companies. Resource nationalism represents a stage in the petro-political cycle, when states tend to increase their control over natural resources. Vivoda argues that the dynamic of the petro-political cycle is affected by the price of oil. Joffe et al. (2009) similarly explain resource nationalism as the determination of states to obtain the greatest advantage from exploiting natural resources. They consider

that the latest cycle of resource nationalism was caused by factors such as a sharp rise of oil prices and the undermined change of the industry.

Continuing with an understanding of energy nationalism, Stevens (2008) includes ideational elements in the conceptualization of energy nationalism. The interests and motivations behind energy nationalism can be exogenous or endogenous factors. An endogenous factor can be exemplified with a domestic perception that an international oil company should not be allowed to use national natural resources. Domestic history and context are highly important when analysing resource nationalism. In energy nationalist countries, the state is often seen as a provider of social and economic development. Hence, being in control of the oil industry would be a cornerstone in the provision of these services. Stevens conceptualises energy nationalism as setting limitations to international oil companies and gaining greater control over natural resources.

Mahdavi (2014) presents an argument on the elements that influence the nationalisation of oil industries. These elements include increased revenues due to high oil prices and a reduced likelihood of international retaliation, which can explain the waves of resource nationalism. While Mahdavi's analysis focuses on the economic perspective, he includes an ideational aspect of resource nationalism as a marginal cause of resource expropriation. He argues that nationalisation provides a satisfaction to the domestic sentiment of being cheated by private corporations. Mahdavi, argues that the sentiment is enhanced by a feeling of xenophobia where foreign actors are perceived as if they were stealing from the country. I argue that the ideational aspect of resource nationalism is more nuanced than the one presented by Mahdavi's argument. In the case of Mexico, while there is a rejection of the foreign, it is bounded to the colonial past. As I discuss in this thesis there are several elements that affected the construction of the resource nationalism discourse. Mexico's colonial past was a main issue in the rejection of the foreign. Colonialism established the valuation of a

country through the commodities that they could produce. This created a need in the nation to be recognised through the ownership of natural resources.

2.8 State ownership

For the conceptualization of state ownership in the energy sector, I discuss the implications in the material world and frame this concept from a constructivist perspective. The importance of state ownership in this research relies on the impact of Petroleos Mexicanos (PEMEX) as an institution and symbol of resource nationalism in Mexico. State ownership refers to enterprises or industries owned or controlled by the state. An example of this is the state-owned enterprises, which sometimes are not required to generate profit. The discussion about state ownership vs. private ownership has diverse angles of analysis, I focus on aspects of efficiency and ideational meaning. According to Perotti (2004) the main criticisms against state ownership are the general lack of accountability, inefficiency, corruption and clientelism. In contrast, private enterprises are perceived to fail to accomplish social objectives, which is one of the main objectives of a state-owned enterprise.

Shirley and Walsh (2000) analyse state ownership and the influence of competition, efficiency and political goals. According to Shirley and Walsh, ownership would not be relevant in a competitive environment if competition were the only factor influencing the performance of state-owned enterprise, however there are other influential factors. One of the main factors is corporate governance, due to the nature of state-owned enterprises they might have some anti-competitive behaviour, such as over employment, bureaucracy and clientelism that might eventually decrease the operational efficiency of the company. With government interference, the company would perform poorly even in competitive markets.

Shirley and Walsh continue to analyse two scenarios of political behaviour towards state-owned enterprises, assuming that a state-owned enterprise has social welfare and common good as a main objective. In the first scenario, political actors act in their own interest to maximize their own utility in different forms such as income or votes, which would eventually affect the common good. In the second scenario, political actors act in favour of citizens, and policies would take into account the interests of the citizens, therefore political actors would maximize social welfare and the objective of state-owned enterprises would be achieved. Shirley and Walsh argue that the analysis of state ownership can be based on this framework. However, there are some strategies that can be used to maximize the efficiency of state-owned enterprises such as separate ownership from control and hire specialized personal for the managerial positions.

State ownership in the case of the energy sector in Mexico can be framed from a constructivist perspective by taking into account the role of sovereignty and national identity. Wendt (1992) maintains that in order for states to be sovereign, they have to continuously reproduce established norms to perpetuate self-determination. Sovereignty, as well, has an effect on property, this being understood as territory or natural resources. Deriving from this, state ownership can be seen as a means to perpetuate self-determination in the use of natural resources and its revenues. The role of state ownership in the collective identity can be traced to the institutionalization of social interests in the structures of the energy sector. The use of revenues originated by the exploitation of natural resources in health, education and improvement of working conditions exemplify the social interests embedded in the energy sector. In the case of Mexico, state ownership has a historical connotation with roots in the oil nationalisation and its subsequent effect on formation of a national identity.

2.9 Resource sovereignty

Sovereignty in resource nationalism is often conceptualised as state control over natural resources. However, Emel et al. (2011) argue that the understanding of sovereignty needs to take into account the global geography instead of only accounting for the national territory. The study of resource sovereignty also needs to acknowledge non-state actors that influence the access and control of natural resources.

The perception of sovereignty over natural resources is imagined as governments and communities aiming to control natural resources. This perception, however, implies isolation from external factors, which undermines the tensions between self-determination and other aspects that impact a state's behaviour, such as foreign investment or climate change. Therefore, sovereignty in the context of resource nationalism is not the control of the territorial natural resources but the authority and capabilities to legitimise extractive industries Emel et al. (2011).

Ong (2012) discusses the relationships between capital and sovereignty. He identifies various ways in which the state interacts with the people and the global economy, such as people's sovereignty, political sovereignty and bio sovereignty. The control of capital in Asia is an example of political sovereignty and the way the state interacts with global capitals. Similarly, Asian states which claim biodiversity as state property, demonstrate a level of bio sovereignty by controlling the management of diverse forms of life. *Positive* sovereignty aims to develop the necessary conditions to create profit and capital accumulation. In this kind of sovereignty, the state has the responsibility to attract foreign investment to the nation (Agnew, 2009). The case of East Timor provides an example of external influences to national sovereignty. In this case, multinational corporations were assisted by the Australian government to advance negotiations on the extraction of oil in East Timor (Hunter and

Storey, 2008). This shows that sovereignty does not constitute an absolute concept but can be adapted by internal and external influences.

Razzaque (2012) discusses sovereignty from an environmental law perspective and draws parallels between law and politics. She argues that environmental regulations tend to be a result of international agreements. However, it might not mean that environmental regulations are a national priority, regardless of the impacts that environmental regulations might be preventing. This argument supports my interpretation that policymakers in Mexico address climate change policy as an international obligation rather than a domestic priority. Razzaque argues that international elements influence national sovereignty through international agreements, and trade. By participating in these dynamics, states agree to limit their national sovereignty.

Sovereignty over natural resources is exercised by the states to provide public benefits. However, the interpretation of what constitutes a public benefit remains a matter of the state. The scope of sovereignty is not absolute, it can be transformed. This can be exemplified by governments which withdraw sovereignty from natural resources to acknowledge indigenous rights over territory. States can maintain ownership and control of certain natural resources that are of significant importance to the national economy, which is usually done in the name of the people (Razzaque, 2012). Laing (2015) discusses Bolivia as a case where state and indigenous groups compete for resource sovereignty. In Bolivia, indigenous groups are vocal about the government of Morales using resource sovereignty in an exclusionary manner. They argue that the territory should be in hands of the people in order to protect the environment and achieve ecological sustainability. This neo-extractivist tension raises a question about the legitimacy of addressing resource sovereignty in the name of the people. The generalisation over the use of the *people* silences the voices of

marginalised groups, such as indigenous populations or groups who are against government policy.

The resource nationalism discourse in Mexico emphasises that controlling the energy sector is in the name of the people, which exemplifies their understanding of sovereignty. However, the generalisation of the name of the people does not necessarily mean that the needs of the population would be addressed, such as the case of the environmental impacts of extractivism.

Conclusions

In this chapter I discussed the most salient concepts for the analysis of resource nationalism in Mexico. I started with an analysis of post-neoliberalism and neo-extractivism in order to place this study within the broader literature. This thesis addresses a gap in the ideational aspects of resource nationalism, by providing a discursive analysis on the construction of the resource nationalism discourse as part of the Mexican national identity. I examined nationalism and provided a constructivist perspective where the state, the nation and the culture are core principles in the dynamics of nationalism. I discussed the role of national identity as an ideational aspect of nationalism. I examined the concepts of social and environmental justice which are highly relevant in the resource nationalism discourse given the tensions uncovered in neo-extractivist literature. This conflict is rooted in the state's dependency on the extraction of natural resources to pursue social development. This approach paradoxically perpetuates social and environmental problems. I argue that at the core of this paradox is the use of distributive solutions for problems of social recognition. As I further discuss in thesis, colonialism imposed a set of values including race relations, the valuation of the nation in terms of the production of commodities, and the separation between

society and nature. This imposition of values impaired the capabilities of the nation to create its own positive sense of identity, which is essentially an ideational matter. Therefore, the use of social justice is a matter of recognition rather than redistribution. I continued with a review on resource nationalism conceptualization and discussed the ideational aspects needed to adapt a constructivist framing. From the understanding of resource nationalism, I differentiate energy nationalism which focuses on energy resources. I finalised with a discussion on state ownership over natural resources and its relationship with resource sovereignty. The conceptual framework serves as a reference to understand the main concepts used in this thesis. In the following chapter I continue to review the theoretical approach and methodology of this thesis in order to explain the procedure used to conduct my research. I discuss the suitability of the discourse historical approach in critical discourse analysis to undertake constructivist research and other considerations, such as scope, limitations, and validity of the research.

Chapter 3. Theoretical Approach and Methodology

In the previous chapters I established the aims of this thesis, which are to understand how resource nationalism was constructed and institutionalized, how it evolved throughout time, and how resource nationalism poses an obstacle for climate change policy. In this chapter I discuss the theoretical approach of this research and the methodological process to answer these research questions. This work is based on qualitative methods; I use a discourse historical approach of critical discourse analysis. I chose this methodological approach given the suitability of discourse historical approach for constructivist research.

In the theoretical approach, I provide an analysis of constructivism and defend my choice of this theory as a framework for analysis. Firstly, I discuss the main ideas of this theory. Secondly, I analyse the advantages of constructivism over other IR theories. I finalize with a discussion of the value and suitability of constructivism as a framework to analyse resource nationalism and climate change policy.

The methodology is divided into five sections: I begin with a discussion of critical discourse analysis and its relevance to this research. I move on to explore the discourse historical approach, its main elements and tools to analyse discourse. I proceed with an explanation of my choice of methodological framework and justify the suitability of the discourse historical approach in critical discourse analysis for constructivist research. I continue to describe the research process and the steps undertaken to answer the research questions. To finalize this chapter, I discuss scope, validity and reliability.

3.1 Theoretical Approach

Constructivism provides a suitable framework to understand the institutionalisation of resource nationalism. This theory also provides useful insights to analyse the domestic internalisation of climate change regulations in Mexico. I chose constructivism due to its recognition of national identity, history and other ideological factors as key elements in the development of shared understandings. In this thesis, I acknowledge the ontological role of both, the material and ideational realities. However, the literature on resource nationalism offers a broad account of the material understanding. Therefore, I focus this study on the ideational aspects of resource nationalism and climate change policy.

I acknowledge that constructivism is a lens for interpretation and as such, resource nationalism and climate change policy can be analysed with other theories such as neorealism or neoliberalism. However, I argue that constructivism can provide understandings on the ideological construction of resource nationalism and climate change policy that other theories overlook. Constructivist theory answers *why* and *how* questions, which explore the constitution of ideas, structures or norms. As my research questions are aiming to understand how does resource nationalism pose an obstacle for climate change policy in Mexico and how was the resource nationalism discourse constructed and institutionalised, constructivism provides an appropriate framework to answer this question.

I divided the contents of this section into two areas, in order to provide the theoretical framework. Firstly, I discuss the main understandings of constructivist theory and present the contributions of constructivism to IR. Secondly, I discuss constructivism as a theoretical framework for the analysis of resource nationalism and climate change policy.

3.1.1 Constructivist theory

In this section I discuss the understandings of constructivism in the literature and explain the main contributions of constructivism to IR. I finalise this section with a discussion of the advantages of this lens over other IR theories. Constructivism aims to build a bridge, to understand the link between the physical reality and our perception of this reality. Adler (2002) provides a thorough explanation of constructivist theory. Adler argues that the world and material reality are not classified by nature, they are instead classified in the mind of the individual. What we understand as knowledge is dependent on our perceptions, interpretation and language.

Constructivism is a reflective theory. Guzzini (2000) states that social processes are analysed considering the historical context and generating awareness of the norms and identities that have generated certain structures. An aim of constructivism is to reveal social structures and mechanisms. Constructivism acknowledges the existence of the material world but the knowledge of this world is dependent on discursive social practices that are transmitted through a shared understanding of symbols and codes (Guzzini, 2000).

Constructivist analysis in IR should take into account the role of identities, institutionalisation, national interests and international governance among others, rather than just the material reality (Adler, 2002). Finnemore and Sikkink (2001) assert that at the core of constructivism there is an ideational perspective; ideas, norms and social structures are the basis for our understanding of the world. Among the main interests of constructivist research are the processes of social construction, identities and norms.

The actions of actors produce and reproduce norms. Simultaneously, norms produce, constrain, and enable the actions of the actors. The mutual constitution of agents and structures is exemplified by the dynamics of identity formation and social norms. Individual identities can be acquired through social learning, but also by triggers such as threats to the

well-being of the individual. Identity can be regulative in terms of setting a framework of reference for the consequences of complying or not complying with social norms. Norms do not have a specific form, they get internalised by the individual and they manifest through socialisation (Onuf, 2017). Therefore, through social learning the individual internalizes social norms, which simultaneously shapes the subject's identity. As this takes place, through the reproduction of social norms by means of socialization, the individual is reconstructing the social structure.

Hopf (1998) states that meaningful behaviour can only exist within an intersubjective social context. The actor's recognition and response of an identity is caused by their understanding of power, norms, and actions in the intersubjective context. By daily reproduction of behaviour, actors shape their identity, but this as well means that a change of behaviour can consequentially change identities. Interests represent an important factor to define behaviour. While the social constructions define an identity, they therefore define the interests or preferences in choices and actions. For constructivists, interests are a central variable in exploring why some interests come to be, while others do not. Intersubjective knowledge can have a self-perpetuating quality, but there is a degree of freedom by which agents reconstruct interests and identities with the preferences that will become institutionalised in the future (Wendt, 1992).

Following the discussion of identities and social structures, I move on to analyse institutions and the process of institutionalisation. Onuf (2002) explores the concept of institutions and their development in IR. He conceptualizes institutions as a collection of interrelated norms and processes with specific characteristics and purposes. Onuf explores the question of design, how institutions come to be and asserts that purpose matters even when there are unintended effects. In Checkel's study of norms, institutions and national identity, he defines institutionalisation as the norms that have acquired consistent power in

the political arena. Checkel measures them by exploring their inclusion in organizations, laws and codes among others (Checkel, 1999). Institutional facts emerge from social processes. For an institutional fact to be taken for granted, Adler (1997) argues that it has to be naturalised, or gain legitimacy by becoming a part of the natural order. According to Klotz and Lynch (2007) the particular meanings of an institutional fact become stable over the time. The constructivist understandings of institutions, and the process of institutionalisation, are particularly relevant in this research. Anchored in these notions, I explore how resource nationalism gained legitimacy and how its interrelated norms and processes have been consistent throughout time.

An understanding of the state and anarchy is particularly important in constructivist IR analysis. Wendt (2003) defines four main elements that constitute a state: cohesive power, legitimacy, sovereignty and a corporate structure. With these elements, an organised society is perceived by its members to have the rightful use of force, in order to pursue their interests. Alongside this, a state must be constituted by individuals who have shared ideas and beliefs, so that the individual thinking would be overridden by the group's perceptions. This dynamic shows the mutual constitution of individuals and states. As I show in subsequent chapters, Wendt's elements of the state are useful in understanding state ownership in the Mexican energy sector, particularly the elements of legitimacy, and sovereignty.

Power plays a crucial role in constructivism. Power determines the capabilities that a state has relative to other states and institutions (Guzzini, 2000). Onuf (2017) offers a discursive understanding of power. He states that the development of concepts is through the abstraction of metaphors. Metaphors represent ideas in relation to other established concepts. When a metaphor is reduced to its most basic representation it becomes an abstract understanding or a concept. Power itself is a well-established concept that encompasses the material reality, a process, a source of transmission and an objective. Power relationships are

the basis of the social fabric, they can be observed in all sorts of backgrounds, where things such as expertise give an individual the ability to influence others through communication.

Sovereignty is an important aspect of international relations. The continual search for recognition is a powerful motivation for a state's approach towards other states. States have to continuously reproduce international norms to perpetuate self-determination. An element in the formation of sovereignty relies in social structures. A social collective must have a high level of interaction and be unhappy with the previous norms and identities. Alongside, sovereignty has an effect on property, this being understood as territory or resources. Lastly, to be recognised as sovereign is crucial to assure security (Wendt, 1992). Sovereignty is a term commonly used in the resource nationalism discourse. However, as further discussed in chapters six and seven, the Congressional understanding of sovereignty includes a symbolic perception. In the context of the resource nationalism discourse, the political elites closely relate sovereignty with state ownership. Sovereignty is perceived to rely in the decision-making capabilities of the state over energy resources.

Wendt (1992) analyses the role of anarchy in international relations. Wendt indicates that neorealist and neoliberalists take identities and interests as a given rather than as a produced and changing concept. He discusses the behaviour of states in the international arena, drawing attention to the meanings that states give to situations or objects. A collective identity defines the meaning of a situation and the actions that a state would take towards other countries. An institutional identity would define the meaning of the distribution of power. Wendt suggests that an initial social communication consisting of signal, interpretation and response, between states, is the first step of an intersubjective understanding that will form an interest or identity.

Having explored the main understandings of constructivist theory, I move on to discuss the approaches within constructivism. Adler (2002) identifies three main strands

within constructivism: rule-oriented or linguistic, middle ground and radical. The work of Nicholas Onuf and Friedrich Kratochwil are the most prominent examples of the rule-oriented approach. In this line of analysis, the researcher aims to understand the construction of the social world by uncovering the social processes formed by norms and language. Rule-oriented constructivism explores the construction and reconstruction of norms and structures through the use of language. The understanding of social structures can be uncovered with discourse analysis, as I have conducted in this research.

The work of Adler and Wendt reflects the middle ground approach or mainstream constructivism which explores the dynamics of states in international relations, acknowledging the relevance of identities and interests in the behaviour of states. In this thesis, I use the understandings of middle ground constructivism to explore resource nationalism. The final strand is the radical approach which can overlap with post structuralism and analyses the social reality as a discursive reality. For the purposes of this thesis I draw from the linguistic and middle ground approaches in order to gain an understanding of resource nationalism and climate change policy through the analysis of language.

Constructivism has increased its importance as an international relations' theory during the past two decades. Checkel (1998) explores the contributions of constructivism to broaden IR analysis. While neorealism and neoliberalism have focused on analysing behaviours of absolute and relative gains, among others, constructivism opens the doors to the analysis of what constitutes society itself. He claims that a challenge for researchers is to demonstrate how, when, and why structural change occurs.

Dessler (1999) asserts that constructivism differs from mainstream theories in part due to the constructivist recognition of the need to pursue research on identity and norms. Kratochwil (2000) discusses the differences between realism and constructivism, where

constructivism seeks to find the meaning given to a material reality in a human discursive context while realism explores the concept outside the human discourse. Jackson et al. (2004) continues to explore the relationship between constructivism and realism, and maintain that both approaches are not necessarily opposing, instead there is scope to be complementary. Sterling-Folker (2002) aim to present the common grounds on which constructivism and realism can collaborate and contribute to bridge the gap between them. Sterling-Folker suggests that a common ontological position is essential to successfully act as complementary theories. In line with this, I agree that beyond the theoretical differences both theories can complement each other and offer different perspectives of analysis. My choice of constructivism is based on the importance of the historical construction of resource nationalism and as I argue in this thesis, the importance of the resource nationalism establishment as a common ground and symbol in the construction of a collective identity.

Kratochwil (2000) scrutinises Wendt's work and debates the most important concepts that make constructivism different from mainstream theories. One of these concepts is the understanding of shared meanings or culture, which engages individuals in the reproduction of practices that construct and reconstruct structures through belief systems. Kratochwil describes Wendt's understanding of the state as anthropomorphised because intentions and beliefs are attributed to the state. However, Kratochwil argues that these anthropomorphic attributions are used to understand the reproduction of state's norms and structures. In this interpretation of the state not all individuals need to have the same idea, but they accept the responsibility to act collectively on interests and beliefs, therefore giving the state legitimacy. This insight is particularly relevant for this thesis, given that I argue that the construction of resource nationalism in Mexico was based on collective persuasion to give the government the legitimacy in a time of political instability.

3.1.2 Constructivism as an approach of analysis for resource nationalism and climate change policy

This thesis is based on a constructivist theoretical framework. In this section I provide a rationale for the theoretical choice to guide the analysis of this research topic. I chose this theory due to the relevance of national identity in Mexican resource nationalism and the relevance of the historical legacy in the political debates regarding the energy sector. In constructivism, the role of identity is crucial; ideas and knowledge give meaning to reality. Actors can define and fix a value for a given object in the material world according to their background and knowledge. The previous notion is linked to the government's actors and their perception of the energy sector. Government representatives are the decision-makers of energy and climate change policy. The discursive stands of the political actors in this topic are based on the value they assign to the historical heritage of resource nationalism and the current needs to further climate change policy. Consequently, a constructivist perspective provides an adequate theoretical framework to understand how resource nationalism poses an obstacle for climate change policy.

In the following discussion, I provide a *blueprint* of the constructivist rationale of this thesis. I assert three main points: methodological coherence, historical explanatory scope and forward analysis. Adler (2002) argues that constructivist analysis needs a coherent methodological practice. Dessler (1999) maintains that in its explanatory scope, constructivism should aim to reconstruct social facts from a historical perspective. Alongside the historical understanding Bernstein et al. (2000) make a case for forward analysis, which would enable the researcher to build scenarios based in the constructed historical knowledge.

In this thesis, firstly, I aim to follow the previous thoughts by providing a coherent methodological practice with the use of critical discourse analysis as I discuss in the methodology section. Secondly, I aim to provide an interpretation of the discursive

construction of resource nationalism from a historical perspective. Finally, I provide a forward analysis based on historical knowledge by giving an understanding on the impact of resource nationalism in climate change policy and what lessons we can learn from the institutionalisation of resource nationalism that we can apply to climate change policy.

To help me explain my theoretical rationale, I draw on Reus-Smith's (2008) excellent analysis of why constructivists tend to analyse history when researching social structures. Reus-Smith claims that history and constructivism are bound together if a scholar aims to understand identities, norms and values among others. A constructivist analysis should be context specific given the great diversity of cultures and histories in IR. The analysis should also identify the agents and structures at a certain point of time, in order to understand the social structure in hand.

In constructivism, the understanding of history is tightly linked with the ontological understanding of reality. For constructivist scholars, there are four main ontological foundations. First, ideational structures are the foundation for political behaviour; material structures, on the other hand, establish the limits to which ideational structures can influence action. Thus, understanding the history of an ideational structure, such as resource nationalism, can explain political behaviour. Second, the interests and motivations of actors are formed by social identities and the actor's participation in social norms. Third, mutual constitution of agents and structures: social structures are perpetuated by the individual's engagement in social structures while at the same time actor's interests and identities are perpetuated by the social structures. Finally, communication is key in the development of agents and structures, it is through language and other forms of communication that agents perpetuate structures and social identities define agents (Reus-Smith, 2008).

As the first element of my theoretical rationale states, my methodological framework is coherent and suitable for constructivist research. I use critical discourse analysis with a

discourse historical approach, which I further explore in the methodology discussion in chapter three. Discourse analysis has proven to be a good method for constructivist inquiries (Milliken, 1999) to identify intersubjective meanings, structures, agents, and to understand social processes. A key aspect in constructivist theory is that language is a mean to make sense of the world around us, the material reality and the unique way the material and social world are organised and intertwined. Language is a way to normalise things and have a reference point to categorise and create meaning. Hence through the analysis of language, we can provide a better understanding of social dynamics. This rationale is the basis for my choice of critical discourse analysis as methodological framework.

Social communication plays an important role in creating meaning. Persuasion can produce shared ideas; hence a constructivist analysis often examines reconstructed discourses to explain how the discourse became validated and relevant in first instance (Adler, 1997). Christiansen et al. (1999) present a discussion of the constructivist approach to analyse European integration. While their overall focus is on European policy, Christiansen et al. raise some important parallels for the analysis of my research topic. First, discourse is a fundamental part of identity formation. Language and other forms of political communication are the blueprint of collective identity formation and social structures. Second, the analysis of the discourse presents a great opportunity to analyse the dynamics of social change. Finally, policy-making is tightly related to discourse, hence by analysing discourse it is possible to find the impact of collective identities and social structures in policy development.

To discuss the second element of my theoretical rationale, namely the historical explanatory scope, Drulak (2001) addresses the need to take history into consideration when analysing structural change. I consider this particularly relevant to my topic, given that my choice to use discourse historical approach of critical discourse analysis aims to provide an understanding of how resource nationalism was historically constructed and reconstructed in

Mexico. Finnemore and Sikkink (2001) State that change in social structures can be exercised by norm entrepreneurs such as activists who work alongside the state to produce social change. Drawing on this idea, an aim of this thesis is to provide my interpretation of how the surge of resource nationalism in 1938 constituted a structural change in Mexican politics. I argue that this structural change happened through mechanisms of discursive legitimation by the government of Lázaro Cárdenas: resource nationalism became institutionalised and represents a central part of contemporary energy policy.

The final element of my analysis, involves the understanding acquired from the construction of resource nationalism and its plausible discursive application to climate change policy. Finnemore and Sikkink (1998) argue that the development of international norms is dynamic and conforms to a cycle. Norm entrepreneurs develop norms, which are then imitated and internalized by relevant states. To continue the cycle, relevant actors exercise pressure to encourage compliance by other states. Finally, when the majority of the relevant states have accepted the norm at hand (even when they have not fully internalized the norms themselves), then a normative change is achieved. Climate change regulations in Mexico are adapted from the international efforts to tackle climate change. Therefore, I argue that climate change policy does not have the same resonance in domestic politics as resource nationalism does. I discuss the discursive understandings on the institutionalisation of resource nationalism to provide a perspective on how decision makers can use discursive strategies to internalize climate change policy in domestic politics.

Weldes (1998) talks about the discursive construction of policy. She argues that the language policy-makers use is not an accurate representation of the world and the problems they tackle. Instead, language actively constitutes a conceptual classification of the problems to solve. Discursive practices in bureaucracy are constitutive of the issues to be faced by the state. Weldes (1998) remarked that actors in bureaucracy who influence policy-making

decisions can have interests related to the state, their organisational position or personal motivations, however these interests are at the same time socially constructed and can be related to specific events in the sociopolitical context. Constructivism can help sensitise practitioners about the impact of social processes and mechanisms of change, in order to emphasise how these are the building blocks of identities and national interests (Adler, 2002). Social pressure and elite learning are the main processes of norm adoption (Checkel, 1999).

3.2 Methodology

In this section I provide an explanation of the methodology used to conduct this research. I begin with a discussion on critical discourse analysis and follow with the discourse historical approach. I then justify my methodological choice and explain the research procedure. I finalise this section with a discussion on the validity, reliability, scope, and limitations of this study.

3.2.1 Critical Discourse Analysis

Critical discourse analysis is a qualitative method in the social sciences and a useful tool to analyse complex social constructs and processes. This can be achieved by gaining understandings of the links between discourse and context. Qualitative research has different approaches (Yates, 2004). A hermeneutic approach would seek to understand the meaning that objects and actions have for a given subject.

Critical discourse analysis can be classified as a hermeneutic approach (Wodak and Meyer 2009). Hermeneutics aim to understand the relations of meaning in human behaviour and social interaction. This approach explores social constructs by means of description, categorization, and analysis of corpus and context (Wodak, 2011a).

Fairclough and Wodak (1997) argue that language constitutes and is simultaneously constituted by society. Discourse represents the relations of power which can be found in different forms of communication, such as texts and speeches. Hence, critical discourse analysis can be used as a tool to find meanings within texts. Wodak establishes that in the analysis of complex texts, it is necessary to understand the process of semiosis, or construction of meaning through hermeneutics. According to Wodak and Meyer, in order to understand and interpret meanings, it is necessary to analyse each linguistic element as part of a bigger picture.

Critical discourse analysis has different approaches and objectives, but they all have the same common elements. For Yates, discourse analysis explores the links between social practices, communication, understandings, and systems of power. Discourse represents concepts, norms and ideas in a given group. The analysis of a discourse can only be understood if the context is taken into account.

For Fairclough (2001) the objective of critical discourse analysis is to explore the role of language in social processes. The *critical* element of critical discourse analysis is the analysis of non-evident meanings, which can uncover relations of power and ideology. Critical discourse analysis looks for meaning that is not evident and explores which ideologies are highlighted or obscured in a given context, according to the lexical choices of the subject. Critical discourse analysis aims to expose the approach that appears neutral on the outside, but may be an ideological discourse that aims to shape public opinion for particular ends.

The meaning behind the discourse can be explored through patterns in the corpus. Phillips and Jorgensen (2002) argue that a discourse is represented by the patterns in which language is structured. These patterns take place in different contexts around the social world. Wodak and Matouschek (1993) argue that critical discourse analysis is inquisitive about

researching power relationships and identities. The means to investigate these dynamics is through the analysis of communication. In order to successfully uncover the complexities of the research topic, it is recommended to have an interdisciplinary standpoint (e.g. linguistics, politics, and history) and to include a historical perspective.

According to Phillips and Jorgensen, discursive practices configure the social world. Social practices can be seen from two perspectives. The first perspective explores concrete individual actions in a specific context. The second perspective emanates from the first one. In the second perspective actions are institutionalized and become part of a social pattern. They argue that it is through language that we develop depictions of reality, which in themselves constitute reality. Discursive practices include the production and consumption of discourse, which plays a key role in the constitution of the social world. This process not only helps to develop social structures, but also to reflect on them.

Phillips and Jorgensen explore four premises of critical discourse analysis. The first premise is that the analyst has to be critical of the knowledge that is taken for granted. This means that knowledge is not a reflection of the world but rather our interpretation of it. The second premise shows the importance of the historical and cultural background. Discourse is part of a social interaction where knowledge, identity and social patterns are created and transmitted. Therefore, discourse can only be understood by exploring its historical and cultural background of a specific interaction. The third premise establishes that social processes transmit our interpretation of the world. The fourth and last premise states that when developing new interpretations of the world, social actions will consequently change.

Fairclough (1995) argues that discursive events can reproduce or transform cultural heritage. This can be analysed by understanding how a specific discursive event took place, and what its purpose was. Fairclough maintains that texts are evidence of change in social structures and processes. The analysis of texts can show which social practices prevail and

which are no longer used. Discourse is an element in the production and reproduction of social identities, interrelations, systems of understandings and meanings.

In terms of the methodological approach to the study of identity, Triandafyllidou and Wodak (2003) argue that identity cannot be classified by objective characteristics, such as, ethnicity, gender or class. Identity can be understood through a discursive analysis of the classification of the *self* and *others* into a collective. Including the attributes shared within the collective and the differences with the others. The shared attributes to analyse identity include socially norms, values and beliefs. However, an individual can show an ideological dilemma, in which the individual can self-subscribe to a group but have different beliefs or values to those of the group. Wodak (2011b) argues that language is the tool for an interactive co-construction of identity. Identity itself is a presupposition of similarities and differences between the self and the other.

Triandafyllidou and Wodak, identify three essential aspects of collective identity: similitude, dissimilitude and an established consistency continued over time. Identity therefore is a discursive system of social classification. Triandafyllidou and Wodak argue that identity is continuously reconstructed through communication, where the members of a collective establish the similitudes within the group and their differences with outsiders of the collective. The discursive practices need to be internalized by the individuals to acknowledge the *belonging* to the collective. Wodak et al. (1999) define four discursive strategies that are used to impact collective identities: constructive, destructive, preserving and transformative.

In the previous discussion, I presented the general elements of critical discourse analysis, which show parallel postulations to those of constructivist theory, such as the mutual constitution of agents and structures, as well as the construction of social structures through language. The parallels between critical discourse analysis and constructivism, makes critical discourse analysis an appropriate choice for constructivist research. In the

following section, I discuss the specifics of the discourse historical approach within critical discourse analysis.

3.2.2 Discourse Historical Approach

The discourse historical approach is a perspective of critical discourse analysis that considers the sociopolitical historical context as a key element for the interpretation of the discourse. In the following discussion, I present the elements of the discourse historical approach, the levels of analysis and perspectives of critique. According to Wodak and Meyer (2009) discourse refers to the semiotic practices in a given context. There are three main stages in discourse historical approach. The first stage is to identify the content of a given discourse. The second stage is to determine the strategies used in the discourse and finally, the third stage is to examine the linguistic means and context. The discourse historical approach methodology aims to include a historical perspective in critical discourse analysis (Wodak, 1999), this allows one to define a perspective on the construction of a discourse over time.

Discourse historical approach provides a rich framework for multi-level understanding of the discourse, through a systematic analysis of corpus and context. Discourse historical approach aims to offer an understanding of social constructs and the relations of meaning (Wodak, 2011; Reisigl and Wodak, 2009). Wodak et al. (1999) argue that discourse is a main element in the construction and reconstruction of identity, social roles and objects of knowledge. Discourse can perpetuate or transform social practices, depending on the ideology or power interests behind it. The objective of discourse historical approach is to analyse the relationship between linguistics and social structures. In order to achieve this objective, discourse historical approach combines a historical, sociopolitical and linguistic perspective to analyse a given issue and its context.

According to Glynos et al. (2009) when carrying out discourse historical approach, it is important to include the context as part of the social and political analysis of the actors. Within the contextual background, history plays a key role to determine the historical elements that constitute a given discourse. This is useful to analyse the context of the oil nationalization of 1938.

Wodak and Meyer (2009) state that discourse historical approach can be used to understand detailed case studies with a mainly historical emphasis. However, Fairclough and Fairclough (2012) argue that discourse historical approach can be taxonomical and focus on very specific parts of the political discourse instead of having a holistic perspective. In order to avoid a taxonomical focus, the following elements of critique can provide a more holistic approach.

Wodak and Meyer (2009) argue that the main elements to analyse in critical discourse analysis are: critique, ideology, and power. However, the interpretation of these concepts varies among the different approaches of critical discourse analysis. For the discourse historical approach, critique includes three main elements: the first element is immanent critique, which aims to uncover the internal structures of the text, in order to discover contradictions, ambiguities, dilemmas and other complexities within the discourse. The second element is socio-diagnostic critique, which, aims to demystify discursive practices or events. Socio-diagnostic critique considers ideology as part of the everyday beliefs and intends to find metaphors, and other lexical strategies that disguise the ideological function of these beliefs (Glynos et al. 2009). As Forchtner (2011) states socio-diagnostic critique aims to demystify populist discursive practices. The final element is prospective critique, which has the purpose of improving communication. Ideology refers to the perspectives of the world shared by the individuals of a specific community. Ideologies are used to construct or maintain power relations. The discourse historical approach aims to understand how

ideologies are reproduced through semiotic practices. Power refers to the unequal relationship between the social actors.

Glynos et al. defines two stages of the discourse historical approach process. The first stage is object delimitation. In order to delimitate the object of study, in the discourse historical approach there are four criteria: discourse, fields, genre and fields of action. The next step is to identify the nexus between micro level texts and macro level sociopolitical context. For Phillips and Jorgensen (2002) the main role of the researcher is to identify how discourse represents reality and what are the consequences of this representation. In order to do so, the analyst has to explore the patterns in the relevant texts.

Wodak (2009) defines six elements of politics and discourse. The first element consists of the performance of politics, which can be understood as the main presentation of the political actors. The second element is the everyday life of politics, which represent the common interactions of politicians. The third element is the impact of the actors, this can be described as the image that a political actor has. For example, a politician can show qualities that produce a good public perception, such as charisma or credibility. The fourth element is the mass production of politics, this element explores who participates in the production the discourse and how it is transmitted to the public. The fifth element is the re-contextualization of politics in the media which explores how discourse is managed and transmitted in the media. The sixth and final element is participation, which explores the relations of power and representation among others.

Wodak et al. (1999) designed a specific methodology for the analysis of the construction of a national identity in the Austrian nation. This methodology includes three areas of analysis: contents, strategies, and means of realization. The contents are divided in thematic areas of analysis defined by the research objectives. In their work, Wodak et al. included the linguistic construction of a common political past, present, and future, as well as

a common culture and a national body. The analysis of these topics was based on the patterns of sameness and difference found in the corpus of the research. The second area is the analysis of strategies, which included constructive, perpetuation, transformation, and destructive strategies. Constructive strategies aim to define and construct a new national identity, which can be achieved by identification and solidarity. Perpetuation strategies aim to maintain an established national identity by using justification or relativize a status quo. Transformation strategies try to change an established national identity by discontinuing or devaluating certain social practices. Finally, destructive strategies aim to dismantle a national identity but usually they do not provide a different model, discursive strategies often use negative presentation and discrediting certain pillars of identity. The third area of research is the means and forms of realization, which use personal, spatial and temporal references among others to construct sameness or difference.

De Cillia et al. (1999) base the study of national identities on the premise that social constructs are produced, reproduced, reformed and dismantled through language and other forms of communication. They regard national identity as a habit of predisposition between members of a group to categorize similarities among members and differences from outsiders. De Cillia et al. show that there is not a unique concept of a national identity. Instead, a national identity is an ever-changing discursive construct of similarities and differences, which can even sometimes be incoherent.

A national identity discourse can include elements of shared history, symbolisms and a collective memory of particular events. These elements are transmitted to members of the collective through diverse means of communication, such as, political speeches and media among others. The symbols that represent part of a national identity are means for the individuals to understand the social world and give meaning to the self. The description of the *we* is contextually problematic, it does not have a fixed concept, but rather a self-

ascription to an imagined group Wodak and Matouschek (1993) argue that argumentation strategies are used by the members of a collective to evaluate and establish responsibility on the *others*, as well as to consider the self as without prejudice or as a victim from the others.

In his analysis of historical discourse analysis, Jóhannesson (2010) argues that legitimation practices are established in historical conjunctures, which are the points of change in social structures when new norms or values are integrated into the current structure. Historical conjunctures are the situations where an idea becomes part of the common conventions in a specific context. However not all ideas are able to coexist through a historical conjuncture and some fail to gain legitimacy. Jóhannesson explains that discursive research can explore what is being said, what is being changed, and what is being silenced. Legitimizing principles are the means through which certain ideas or practices are validated and normalized. Normalization occurs through power relations, when an idea or social process becomes institutionalized. The discourse historical approach is an approach that can help the researcher understand how meanings change and gain legitimacy. By gaining this understanding, the researcher can develop a narrative that explains the relationships between meaning and context across time.

In this section, I have introduced the discourse historical approach of critical discourse analysis. I commented upon the elements to search for in the discourse and the means of critique of the discourse historical approach. I addressed components for historical discourse analysis and national identity. In the following section I review my choice to use the discourse historical approach of critical discourse analysis and its suitability in constructivist research.

3.2.3 Methodological Choice

The discourse historical approach from critical discourse analysis as advanced by De Cillia, Reisigl and Wodak (1999) presents a relevant opportunity for constructivist research. In this discussion, I present the parallels between the discourse historical approach of critical discourse analysis and constructivist theory. The following parallels and the suitability of the discourse historical approach of critical discourse analysis to answer my research questions are the basis of my methodological choice.

Critical discourse analysis is a suitable tool for constructivist research. Critical discourse analysis uses the analysis of language to uncover hidden meanings and relationships of power. Onuf (2016a, 2016b) examines how metaphors create consequential meaning. Hence, a linguistic analysis can uncover the political meanings and their effects on the material and social world. De Cillia, Reisigl and Wodak's work on national identity is based on the work of constructivist scholars such as Benedict Anderson (1988). Hence their developments in critical discourse analysis are specifically designed as a tool of analysis based on the ontological assumptions of constructivism.

A key aspect in constructivist theory is that language is a mean to make sense of the world around us, the material reality and the unique way the material and social world are organised and intertwined. Language is a way to normalise things and have a reference point to categorise and create meaning. It allows us to create a sense of self in comparison or reference to the rest of the material world. Social practices use the creation of meaning to normalise the material and social worlds and define what is acceptable or what is the norm.

Discourse analysis has proven to be a good method for constructivist inquiries. Critical discourse analysis can be used to identify intersubjective meanings, structures, agents, and to understand social processes (Milliken, 1999). Critical discourse analysis is useful to identify why some discourses become institutionalized rather than others and the

foundations to validate these discourses. From the historical point of view, facts obtained from records and other objective sources should facilitate the researcher and understanding of historical reality. However, this reality is subjective to the social constructs that the researcher is using to analyse facts (Reus-Smit, 2008).

The analysis of ideas in history aims to gain an understanding of how those ideas became legitimised or gave meaning to certain processes or structures. The meaning of speeches or any other form of communication needs to be analysed in relation to the context in order to fully understand the motivations and interests behind an actor's action (Reus-Smit, 2008). This is why the use of three levels of analysis in critical discourse analysis is highly relevant. In order to properly understand the discourse, it is necessary to understand their relationship with other texts, as well as the historical and sociopolitical context.

According to Yates (2004) the objectives of qualitative research in the social sciences varies across disciplines but they include the analysis on the complexity of specific processes in a given social context. The aim of the research can look for the cause of a specific process or an understanding of how the individuals or groups perceive their world. Another goal could be the analysis of how the subject give meaning to a certain process or context. The objective of this research is to analyse the historical construction of resource nationalism in Mexico and to understand how resource nationalism is posing an obstacle to climate change policy. The specific social process that I explore is resource nationalism, I aim to uncover the complexities of how it was constructed and reconstructed through semiotic processes and specific discursive events. I analyse how political elites perceive resource nationalism and how it influences their political choices. The discourse historical approach of critical discourse analysis will enable me to unveil the hidden meanings in the discursive practices of resource nationalism. The understandings of the resource nationalism discourse will broad the comprehension on how resource nationalism impacts climate change policy. In the

following section I examine the specifics of the research process, and the steps taken to answer the research questions.

3.2.4 Research Procedure

The research procedure conducted to analyse the research questions is based in the discourse historical approach of critical discourse analysis. In the previous sections I presented a discussion of critical discourse analysis and the discourse historical approach. I now move on to explain the specifics of the research process. For this research, I use five levels of analysis. The first four levels are focused in the analysis of the discourse and the final level analyses the impact of the resource nationalism discourse in climate change policy. The critical discourse analysis on resource nationalism consists of four levels of analysis: lexical, intertextual, contextual and critical. After uncovering the complexities of resource nationalism, I provide a further critical analysis to assess the impact of the discursive practices of resource nationalism in climate change policy.

The research process was conducted in four iterative stages for each presidential term:

1. Contextual analysis
2. Corpus building
3. Lexical and intertextual analysis
4. Critical analysis

After analysing each presidential term, I continue the research procedure with a critical analysis on the resource nationalism discourse, considering the understandings gained from each individual analysis. In this analysis, I apply the levels of critique from the discourse historical approach: immanent critique, to reveal the structure of the texts including contradictions and ambiguities. Socio-diagnostic critique, to map the relationship between texts and context in order to demythify discursive practices and finally prospective critique

where I provide my interpretation to improve communication (Forchtner, 2011; Glynos et al., 2009; Wodak and Meyer, 2009) I finalize the research process with a critical analysis of the impact of the resource nationalism discourse in climate change policy.

The first step to develop the analysis was to define the periods to analyse. According to the relevance in the resource nationalism discourse and climate change policy I chose the following presidential terms:

1. Lázaro Cárdenas 1934 – 1940
2. Ernesto Zedillo 1994 – 2000
3. Vicente Fox 2000 – 2006
4. Felipe Calderón 2006 – 2012

The analysis of the presidential terms of Ernesto Zedillo, Vicente Fox and Felipe Calderon are directly relevant to answer the main research question: How does the resource nationalism discourse pose an obstacle for climate change policy in Mexico? Because it was during this timeframe that climate change gained relevance in domestic politics. The analysis of the presidential term of Lázaro Cárdenas is addressed as the historical part of resource nationalism and aims to answer the question: How was resource nationalism constructed and institutionalised? I decided to exclude the presidential terms from 1940 to 1993 because the resource nationalism discourse and energy policies were generally consistent with the policies found in Cárdenas' administration and climate change was not a relevant issue in domestic politics. In the following section I begin the discussion of the levels of analysis conducted for this research.

3.2.4.1 Level one

The first level of the research is the contextual analysis, this was divided into: historical, and sociopolitical. The analysis of context includes specific situations alongside social and

institutional variables. The sociopolitical and historical analysis refers to a broader range of discursive practices that are useful to set a framework of the context (Wodak 2008). In order to understand the situations surrounding the main periods of analysis I conducted a review of academic literature for the given timeframes. The review was delimited by themes of resource nationalism, significant historical events such as, the oil nationalisation, as well as climate change and environmental policies.

In terms of the historical context, the analysis of the historical construction of resource nationalism presented in chapter five is in itself the historical context of the contemporary resource nationalism discourse presented in chapters six and seven. The historical context regarding the construction of resource nationalism during the presidential term of Lázaro Cárdenas, which I discuss in chapter five, was based in the early precedents of the resource nationalism discourse. I explored themes of exploitation and identity from colonial times onwards, finding the earliest precedent of resource nationalism in the debates from the Courts of Cadiz during the times of the Mexican independence in 1810. I continued the historical analysis with the theme of the Mexican revolution of 1910, including the social and political impacts.

The sociopolitical analysis of each term, is guided by prominent events and challenges that were relevant to the topic. In the historical resource nationalism, the themes on the sociopolitical context, included structural changes in the government, political developments and social challenges. The sociopolitical context in the analysis of contemporary resource nationalism included themes of international cooperation, domestic events relating policy and democracy, as well as social challenges.

3.2.4.2 Level two

The second level of the research was assessing the relevance of texts in the corpus. The choice of the corpus depends on the research question and relevance within the object of study. In this level, I searched and obtained the relevant texts for the discourse analysis. The primary source of the corpus was the digital archives of the Mexican Congress, including the Senate and Deputies' chambers¹.

From the electronic archives, I accessed the debates diaries. The identity of the corpus was in its majority the transcripts of the debates conducted in each session of the Congress. The debate diaries are categorized by legislature number and date. The legislatures analysed are the following:

Table 1.

Legislatures

Lázaro Cárdenas 1934 - 1940	Ernesto Zedillo 1994 - 2000	Vicente Fox 2000 - 2006	Felipe Calderón 2006 - 2012
XXXVI 1934-1937	LVI 1994-1997	LVIII 2000-2003	LX 2006-2009
XXXVII 1937-1940	LV11 1997-2000	LIX 2003-2006	LXI 2009-2012

The universe of documents from the Congress amounted to 2798 from which 212 were considered relevant. In order to identify the relevant documents for the discourse analysis I conducted a word search of the terms relevant to the topic. The terms were classified by themes of energy, legacy and environment. The word search was conducted in Spanish and

¹ The archives can be accessed through the following links:

1. Deputies chamber www.diputados.gob.mx/informacionparlamentaria.htm
2. Senate chamber www.senado.gob.mx

the inquired terms varied according the relevance to each presidential term. In table two I present the translation of the main terms in the word search.

Table 2.

Word search terms²

Theme	Energy	Legacy	Environment
Terms	Oil	1938	Environment
	Gas	Lázaro Cárdenas	Climate change
	Electricity	Oil nationalisation	general law of climate change
	PEMEX	State owned company	General law of ecologic balance and environmental protection
	CFE	Foreign oil companies	UNFCCC
	LyFC	Standard oil company	Environmental degradation
	Renewable energy	Royal Dutch shell	Environmental protection
	Oil revenues	El águila	International agreement on climate change
	Privatisation	Oil labour union	International summit

After the first step to define the relevant texts through a word search, I conducted an iterative process of exploring the texts and determining if they were relevant for the analysis. The relevance of the text was primarily defined by assessing if there were ideational debates or speeches relating to the topic. The main reason to consider a text irrelevant was due to the lack of discussion between policymakers or discussing exclusively technical aspects of a

² The terms in the word search included derivative and related words to the presented above. Therefore, this table does not represent the full extent of the word search.

policy. In order to consider a text relevant, it required to exhibit an ideational discussion of the elements of resource nationalism. In the case of climate change, the texts included discussion on policy given the lack of an ideational debates on climate change.

In terms of the historical discourse, it is important to point out that the analysis of the debate diaries only reproduced the *official discourse*. Therefore, I went beyond the legislative corpus and explored material from other relevant actors in the discourse. For this analysis, I researched documents from the digital archives of the Supreme Court of Justice. The corpus included compilations of manifestos, speeches, and letters, among others.

3.2.4.3 Level three

The third level of the research constitutes the lexical and intertextual analysis. The purpose of the lexical analysis encompasses understanding the lexical strategies and choices within a single text. The intertextual analysis aims to identify salient lexical strategies and choices within the corpus. A summary of the lexical strategies and their meanings can be found in annex one.

The analysis of text includes the immediate lexical analysis and the intertextual patterns and utterances. The analysis of text, according to Wodak (2008), includes a text internal and text external analysis. The following two elements are used in the text internal analysis. The first element is cohesion, which analyses the lexical choices in the text, such as recurrence and conjunctions. The second element is coherence, which concerns the meaning of the text. Table 3 shows the main lexical strategies for the analysis of text at an internal level.

Table 3.

Text internal elements

<u>Strategies</u>	<u>Representing</u> <u>Actors</u>	<u>Semiotic Choices</u>	<u>Rhetoric</u>	<u>Representing</u> <u>Actions</u>	<u>Quoting verbs</u>
Internal elements	Personalization / Impersonalization	Connotation	Metaphor	Material Processes	Neutral structuring verbs
	Individualization / Collectivization	Overlexicalization	Hyperbole	Mental Processes	Metapositional verbs
	Specification / Generalization	Lexical absence	Personification / objectification	Behavioural Processes	Metalinguistic verbs
	Nominalization / Functionalization	Structural oppositions	Metonymy	Verbal Processes	Descriptive verbs
	Pronoun / Noun	Lexical choices	Synecdoche	Relational Processes	Transcript verbs
	Honorifics			Existential processes	
	Objectivation			Adjuncts	
	Anonymization			Grammatical positioning	
	Aggregation			Abstraction	
	Suppression				

The following criteria are used in the text external analysis. Firstly, intertextuality, which shows how text relates to other texts. Secondly, intentionality, which determines the attitude of the authors towards the text and message. Thirdly, acceptability, which refers to the attitude of the audience towards the message of the text. Fourthly, informativity, which refers to the amount of new information in the text. Finally, situationality, which shows if the

text is appropriate to the context. Table 4 includes the main elements of analysis of the corpus at an external level, including a micro and macro level.

Table 4.

Text external elements

	<u>Micro level</u>	<u>Macro level</u>
External Elements	Intertextuality	Sociopolitical background
	Context	Historical background
	Intentionality	
	Acceptability	
	Informativity	
	Situationality	

3.2.4.4 Level four

The fourth level of the research process is the critical analysis of the resource nationalism discourse. After understanding the lexical strategies and intertextual meanings, I uncover the nexus with the sociopolitical and historical context. In order to understand the construction of resource nationalism I unveil the social processes behind it, as well as the representation of the actors in the discourse.

For Reisigl (2008) the analysis of political rhetoric is useful in discourse analysis. An initial aspect to understand political rhetoric in the discourse, is to define how the actors are being constructed. This can be defined by certain lexical elements, such as nomination or individualization³. The representation of the social actors in a text can show qualities or negative traits and use argumentation schemes to justify that claim.

The critical element of discourse analysis means to remove the normalization of a discourse in order to uncover hidden purposes and meanings (Fairclough, 2001). In order to

³ A definition of the lexical strategies can be found in annex 1

do so I use the three levels of critique presented by Wodak and Meyer (2009), immanent, socio diagnostic and prospective critique. I present a critical analysis for each presidential term analysed and a comprehensive analysis of the resource nationalism discourse accounting the meanings uncovered from the entire research process.

3.2.4.5 Level five

The final level of this research process is the critical analysis on the impact of resource nationalism on climate change policy. For this level, the critical analysis emanates from the contextual analysis on climate change policy and the critical analysis of the resource nationalism discourse. In this analysis, I uncover the discursive practices that compete with climate change policy. I explore the sociopolitical and historical context of resource nationalism and climate change policy to address the differentiation in domestic adoption of norms and regulations and their unequal relevance in the political discourse. I finalize with use of prospective critique to determine the discursive lessons of resource nationalism that can be adopted to advance the relevance of climate change policy.

3.2.5 Other Considerations

In this section I begin exploring the validity and reliability of the research, accounting for the methodological coherence and reliability of sources. I move on to explain the scope and limitations of this research and finalize with the ethical considerations. The following discussion justifies the validity and reliability of this research.

3.2.5.1 Validity and reliability

The following discussion presents the foundations for the validity and reliability of this research. I explore the elements of coherence, suitability, research process and levels of analysis. I finalize with an outline of the factors that make this research valid and reliable. Finnemore and Sikkink (2001) state that in constructivist research there is not a set methodological process. In order to provide a reliable analysis, the methodology should aim to provide an interpretation of the big picture, through the use of diverse sources of data and ensuring their relevance to the context. They state that interpretative research cannot always be replicated, but elements of replicability can increase the validity of the research. The description of the research process in section 3.4 provide the elements of replicability of this research. Finnemore and Sikkink argue that using different levels of analysis increases the validity of the research. Through the use of lexical, intertextual, contextual and critical analysis I apply several levels of analysis in this research.

Jaipal-Jamani (2014) provides an understanding of the elements to validate discourse analysis with perspectives from semiotics, and systemic functional linguistics. A starting point to increase the validity of the research is the framing of the research question. The research question should aim to uncover social, political or economic relationships through gaining an understanding of how language constructs or reconstructs those relationships. From the semiotics perspective, communication in society is understood through a system of signification, where the meaning of signs is widely understood. In written communication, language is the system that provide significance and linguistics can provide the tools to understand the meanings of the discourse. From the systemic functional linguistics perspective, language and meanings are mutually constitutive, hence the analysis should aim to uncover social processes and relationships. Therefore, it builds from the linguistic analysis to its function in the context. Validation in the critical analysis comes from uncovering

relationships and complexities of power. It aims to understand social reality and how language creates and perpetuates power relationships.

Morse et al. (2002) define the elements to determine the validity and reliability of a research project. Firstly, methodological coherence, where the research question should be coherent with the methodology and analysis. Secondly, the sample must be appropriate, where the data and participants should be relevant and representative to the research topic. Thirdly, the collection and analysis of the data represent an iterative interaction to obtain the information needed.

The meaning of speeches or any other form of communication needs to be analysed in relation to the context in order to fully understand the motivations and interests behind an actor's action (Reus-Smit, 2008). This is why the use of different levels of analysis in critical discourse analysis is highly relevant. In order to properly understand the discourse, it is necessary to understand their relationship with other texts, as well as the historical and sociopolitical context (Reus-Smit, 2008).

Conducting historical discourse analysis should fulfil the criteria of qualitative methods in order for it to be valid and reliable, such as explaining the rationale of the research topic with the choice of methodology, justifying the selection of the corpus and explaining the process of analysis. If unexpected themes are found in the historical discourse analysis the research can often evolve from the original research question. This situation can lead to new understandings of the discourse and the context. In order to provide an interpretation of the discourse, the elements to identify are: discursive themes, patterns, ambiguities, and conflicts of arguments, legitimating principles and silences among others.

Facts obtained from records and other objective sources should facilitate the researcher and understanding of historical reality (Reus-Smit, 2008). The analysis of ideas in history aims to gain an understanding of how those ideas legitimised or gave meaning to

certain processes or structures. In respect to the researcher it is important to note that while the previous knowledge and understandings are going to impact the critical interpretation of the discourse, it is important for the researcher to self-reflect and aim to maintain a distance between the topic and the personal position to avoid any negative impact on the validity of the research (Wodak, 1999; Jóhannesson, 2010).

The validity and reliability of this research is based in the previous elements of discussion. The following outline defines the elements of validity and reliability of this research.

1. The framing of the research questions aims to uncover the relationship between the social constructs of resource nationalism and climate change policy, as well as the complexities and hidden meanings of the resource nationalism discourse.
2. I provide rationales for the research topic, the theoretical framework and methodological choice.
3. The discourse historical approach of critical discourse analysis and constructivist theory have ontological parallels that present a suitable framework for the analysis of the research questions, which provides a methodological coherence.
4. The corpus of this research was built with texts from reliable sources, such as the digital archive from the Mexican Congress and the supreme court of justice.
5. I provide a thorough methodological process and the sources of the corpus in order to provide a value of replicability.
6. The corpus used is relevant to the research question and representative of the issue analysed.
7. The analysis conducted delivered different levels of analysis: lexical, intertextual, contextual and critical.

8. The analysis is coherent with the research process described in this chapter, which was designed to be objective, iterative and coherent.
9. I use an interpretative approach for this thesis. While the interpretation of a topic can differ from one researcher to another, I grounded my interpretation in coherent theoretical and methodological frameworks to increase the relevance and validity of my critical analysis.

In the previous paragraphs, I presented a framework for research validity and reliability. I moved on to outline the considerations that make this thesis valid and reliable. In the following discussion, I review the scope and limitations of this research.

3.2.5.2 Scope and limitations

In this section I discuss the scopes and limitations of this thesis. I begin with an examination of the scope in the analysis of resource nationalism and continue to address climate change policy. I review the scope of the research topic and the limitations of the methodological approach. In this research, I explore the historical construction of resource nationalism in Mexico in the presidential term of Lázaro Cárdenas as well as its contemporary reconstruction in the presidential terms of presidents Ernesto Zedillo, Vicente Fox and Felipe Calderon.

In the historical analysis, I draw from historical precedents of resource nationalism dating from colonial times. However, this is set to provide a context for the analysis of resource nationalism in the presidential term of Lázaro Cárdenas. Therefore, the contextual analysis of historical resource nationalism has a broader timeline than the discursive analysis. The analysis on the construction of resource nationalism could be expanded to fill the gap on discourse analysis from 1940 to 1994. I chose to leave this timeframe gap because of the lack

of direct relevance of this timeframe to the analysis of the impact of resource nationalism on climate change policy.

The choice of timeframe for the contemporary resource nationalism was directly related to the development of climate change policy and its early precedents. In terms of further research, the link between resource nationalism and climate change policy can be addressed from 2012 onwards, especially approaching the changes in the energy sector.

In terms of climate change policy, the analysis was focused in a contextual examination of its precedents and rise in relevance. Climate change policy is objective and has specific goals to achieve, unlike resource nationalism which is a subjective process that is ingrained in the collective memory. In order to analyse the impact of resource nationalism in climate change policy, I explore the discursive dynamics of political elites and uncover the hidden meanings rooted in the resource nationalism discourse, which can impact the goals of climate change policy.

The limitations of the methodological approach are established in the range of the discourse analysis. I chose to primarily base this research in the debates of the Mexican Congress. I collected the corpus from the digital archives from the Congress to conduct the lexical and intertextual analysis. I then I linked the findings with the sociopolitical and historical context to provide a critical analysis. However, this sets a very specific frame for discursive practices. I sustain that this frame is highly relevant, because the discursive practices and ideational stands of political elites, directly impacts policy.

From the theoretical point of view, I use a constructivist approach, which I use to explore the ideational foundations and the construction of resource nationalism. While I do not reject the material perspective of other IR theories, the scope of this research is to understand the ideational aspects of resource nationalism and its impact in climate change policy.

Conclusions

In the theoretical approach, I presented the main understandings of constructivist theory. I discussed the mutual constitution of agents and structures and how identities and social norms are constructed and reconstructed through language. I moved on to the conceptualisation of institutions and the state, including the elements of power and sovereignty. I explained how legitimation practices institutionalize norms and regulations and the dynamics in the international arena. I followed with the contributions of constructivism to IR theory and how constructivism has advanced IR theory by providing understandings on the construction of the social fabric. I finalized this section with a blueprint of my theoretical rationale, where I explained its three main elements: methodological coherence, historical explanatory scope and forward analysis. I use the constructivist framework presented in this chapter as a guide for the critical analysis of resource nationalism and climate change policy, which I present in the empirical chapters five, six, seven, and eight.

In the methodology section I have examined the literature framework of critical discourse analysis and the discourse historical approach. I explained the main components and aims of critical discourse analysis and the methodological process of the discourse historical approach. I continued to justify my methodological choice, its coherence with the theoretical framework and its suitability to answer my research questions. I moved on to define the research process and finalized with other considerations including the validity and scope of the research. In the following chapter I introduce the context of resource nationalism and the background of climate change policy.

Chapter 4. The Context of Resource Nationalism and the Legislative Background of Climate Change Policy

The study of resource nationalism and climate change requires a profound understanding of the geopolitical context. In this chapter I explore the existing literature and discuss three central themes: resource nationalism, the energy sector in Mexico, and climate change policy. I begin with a discussion on resource nationalism in Latin America to provide a geopolitical background of the region and address the similarities with the case of Mexico. I move on to review the literature of resource nationalism in Mexico to provide a general outlook of the resource nationalism dynamics in the country. Given that the discussion of resource nationalism in Latin America and Mexico point towards an *anti-west* sentiment I finalise the discussion of resource nationalism with the case of NAFTA and the Mexican energy sector.

I proceed to analyse the theme of the energy sector in Mexico. I start the discussion with a brief explanation of the legislative system in Mexico and the political party's dynamics. I carry on giving an overview of the energy sector in Mexico. In this section I explain the structure of the sector and its relevant figures, as well as its levels of sustainability. I finalize this chapter with a discussion of climate change policy. For this section I provide an overview of the domestic and international precedents in climate change policy. I conclude the section with a review of the structure and goals of the general law of climate change, which is the most relevant policy instrument to address the challenges of climate change. In the following section I begin my overview of resource nationalism, with a framework on Latin America.

4.1 Resource Nationalism in Latin America

In many Latin American countries resource nationalism is an important element of the political discourse. However, resource nationalism is not a homogeneous phenomenon and does not have the same relevance in every country. In order to understand the geopolitical framework of resource nationalism it is important to discuss the context of resource nationalism in Latin America. Given the historical roots of resource nationalism and the elements of collective memory linked to the energy sector, Mexico represents a very particular case of resource nationalism within Latin American politics.

Resource nationalism has acquired an *anti-west* character and has become a symbol of sovereignty in Latin America. Most countries have laws of exclusive ownership of the natural resources with the purpose to benefit the nation. Nevertheless, resource nationalism can be used as a political tool to influence dependant countries that are considered political or ideological adversaries (Sikiri, 2010). Mares (2010) argues that countries can use resource nationalism to perpetuate an anti-west ideology, and polarize domestic policies in order to increase the likelihood of building a dominant political movement.

Isbell and Steinberg (2008) argue that energy plays a key role in the geopolitical configuration of Latin America. Isbell and Steinberg state that a wave of resource nationalism developed due to the need to guarantee energy supply for the increasing demand in their own countries. Some Latin American countries including Venezuela, Bolivia and Ecuador have showed discursive elements of resource nationalism that appeal to sovereignty and social justice. Unlike other Latin American countries, resource nationalism in Mexico has a deeper historical background, which I discuss later in this thesis.

The political discourse regarding oil in Venezuela, states that oil revenues are used to increase government funds and mitigate social problems. However, this political strategy has

negative effects on the production capacity in the medium term. Among the changes made by Chavez, a large part of specialized human capital was made redundant. Chavez's policy created great discomfort in the sector, in 2002 and 2003 oil strikes caused violence that killed seventeen people and injured more than 100 people (Isbell, 2006).

According to Isbell, Chavez referred to these events as signs of sabotage bordering on terrorism. Isbell argues that Chavez's policy not only endangered the sector, but also perpetuates a tradition of corruption, waste and degradation. In the case of Venezuela, the energy sector is controlled by the government and had a direct relationship with Hugo Chavez's public policy. The government income increased due to oil revenues alongside with public expenditure, but the sector had serious problems such as reduced efficiency and investment (Isbell and Steinberg, 2008). Isbell (2006) argues that the long-term effects of resource nationalism could lead to a zero-sum behaviour of big consumers such as China and US in a nationalist competition to access hydrocarbons.

Rosales (2017) explains the emergence of resource nationalism during the 1970s in Ecuador. Rosales argues that resource nationalism had material and ideational motivations, which were a response to the previous liberal policies on resource extraction. Rosales uncovers a similar resource nationalism narrative as the one found during the nationalisation in Mexico, where oil is presented as a resource that *belongs* to the people, thus the people *deserve* to control it. Secondly, the management of oil is acknowledged as a matter of sovereignty. Lastly, an argument of social justice is evident in which, the revenues from oil should be used for social development and be available to the majority of the population and not only elites.

Resembling the case of Mexico, Kohl and Farthing (2012) present an analysis of resource nationalism in Bolivia. Resource nationalism in Bolivia has historic precedents of resource exploitation by foreign countries. Since colonial times, the Spanish used Andean

people as labourers for gold and silver mines. After the independence, the same pattern continued with the elites and the working class.

In modern Bolivia, resource nationalist movements are ingrained in the culture. Social movements reinforce the narrative of defence of the natural resources and fight for their interests. However, this does not mean that is a narrative that everyone agrees with. Indigenous groups in Bolivia fight against extractive industries because they degrade nature and disrupt their livelihoods. When Morales nationalized the gas fields, his narrative claimed that the gas fields were property of all Bolivians and the nationalisation had the purpose to defend the industrialization of natural resources. When hydrocarbons were nationalized, Morales narrative claimed that the people *conquered* with their blood, the return of the fossil fuels to the control of the nation. Therefore, the revenues obtained from fossil fuels would be used to serve the people.

Kaup and Gellert (2017) state that resource nationalism is a cyclical process that does not necessarily mean a domestic strategy for social change but a strategy to shift the power in the international arena. They argue that during the periods of accumulation, western powers obtain the benefits of extractivism in the capitalist society. After the start of a resource nationalism cycle, countries use the wealth from the extractive practices to achieve goals that would not be achievable without the control of the extractive industries, such as reduction of inequality and chronic poverty.

Resource nationalism in Latin America presents similar discursive practices as the ones observed in the case of Mexico. However, the historical construction of resource nationalism in Mexico institutionalised the energy sector and particularly the oil industry as a symbol of sovereignty in the national identity.

4.2 Resource Nationalism in Mexico

The energy sector in Mexico seems to be governed by inertia and tradition. Resource nationalism has deep historical roots. After the end of the Mexican revolution in 1920 the inequalities remained constant in the country, while political factions were competing to consolidate power. There was a need for a symbol to justify the violence of the revolution and construct a new identity as a nation. The new symbol would represent the victory against the foreign and would legitimate the new order (Schettino, 2009). Resource nationalism has a deep historical background. Since the establishment of the federal electricity commission (CFE) in 1937, the nationalisation of oil in 1938, and the creation of Petroleos Mexicanos (PEMEX), the energy sector became a symbol of sovereignty. In this section I present the resource nationalism context in Mexico and an overview of the literature in Mexican resource nationalism.

Resource nationalism represents an important part of Mexican history. According to Madureira (2008) the nationalization of natural resources was a sign of leaving the past of violence and exploitation behind and moving forward to a future of progress. The nationalisation was welcomed by the people with enthusiasm and pride. A consequence of the success of the nationalisation was for the economy to move towards intensive use of fossil fuels without understanding the future environmental implications. The notion of welcoming a new era simultaneously signified a construction of a new national identity, and identity that was linked to the energy sector.

Mexico nationalised oil in 1938 making it one of the first countries that presented a resource nationalism discourse. Two earlier precedents were the Soviet Union and Bolivia. The Soviet Union established a government based on Marxism, where all the means of production are in control of the state, including oil production. In 1937, the military

government of Bolivia expropriated Standard Oil. In Mexico, an early legislative precedent was approval of the 1917 constitution. The article 27 of the constitution states that all the resources in the subsoil are property of the state, guaranteeing the sovereignty of the state among its resources. According to this, foreign oil companies were just concessionaries and this settled a precedent for the oil nationalization of 1938 (Mabro, 2007).

Lázaro Cárdenas, who according to Mabro (2007) was a political radical, became president in 1934. During this time, the perception of foreign companies exploiting the Mexican oil, became aggravating. In 1938 Cárdenas nationalised oil in Mexico, there was strong international pressure on the matter but with the events of World War II, the attention to oil nationalisation vanished. Mabro considers that the distrust from the past towards foreign countries remains constant and influence the decision making of the government.

The work of Saxe-Fernandez (2005) shows a clear example of the discourse of sovereignty in energy policy. *Mexico for the Mexicans* was a slogan used by President Lázaro Cárdenas during the oil nationalization. Saxe-Fernandez appeals to history and tradition to argue against reforming the energy sector. He presents the social welfare and economic growth achieved between 1938 and 1982 to compare them with the state of the energy sector during the term of Vicente Fox. Saxe-Fernandez states that a neoliberal reform would be a tool of the American imperialism to influence internal politics. When the Saxe-Fernandez addresses the industry inefficiency and the need of a change, he references history and the political thought of 1938.

Schettino (2009) explores the revolutionary nationalism in Mexico and the role of oil as an instrument to consolidate a political structure. Oil was at the centre of the structural changes in the political landscape. According to Schettino the structural changes achieved by Lázaro Cárdenas developed a particular political system that was able to govern for more

than half of a century without major problems. Schettino argues that the role of oil as a pillar of the national identity represents a strong factor in the political discussion of energy reforms.

During the presidential term of Vicente Fox, an energy reform was proposed, which included the association with foreign industries, in order to obtain the necessary technology for oil exploration. To this matter, Saxe-Fernandez argued that if Lázaro Cárdenas had championed that kind of ideology Mexico would not have oil, and the technology required for exploration could be easily bought. I consider this to be a clear example of resistance to change. Saxe-Fernandez uses political history and tradition to analyse the discussion of energy policy. The argument of Saxe-Fernandez focuses on the importance of history and does not consider the economic or environmental implications.

Resource nationalism has different variables that define its influence in each country. According to Mares (2010) the case of Mexico indicates a high level of resource nationalism and a low level of energy security. The level of these variables is based on the monopoly in the production of oil and the imports of fuel. The Mexican political system seems to have leaders that are moderately risk acceptant statist. Moderately risk acceptant statist leaders have enough incentives to increase the participation of the private sector, regardless of the state control in oil production. Former president Calderon was an innovative and cautious leader. According to Mares (2010) former president Felipe Calderon had an opportunity to change the energy sector slightly decreasing resource nationalism and increasing energy security. However, the PRI party controlled the reform process in the Congress and they only approved reforms for which they could take credit for. Even with the support to approve an energy reform and without a strong Congress resistance, there is a collective memory linked to the energy sector, which would limit the scope of a reform.

The history of the electricity subsector is similar to the history of oil. The nationalization of the electricity subsector as Belmont (2011) states, mythologized the

electricity federal commission (CFE). Luz y Fuerza del Centro (LyFC) a parallel company of CFE, supplied and managed energy for the capital of the country. A federal decree ordered the closure of LyFC in 2009, due the inefficiency of the company. The closure of LyFC caused an ardent debate in politics and society. The labour union of this company was against this ordinance. LyFC's labour union argued the closure of LyFC was against the principles of social justice. Belmont uses this case to discuss the prevalent political and ideological confrontation in the energy sector.

4.3 Resource Nationalism and NAFTA

The discussion of resource nationalism in Latin America, depicted the discursive practices of anti-west. Thus, in order to fully understand the dynamics of resource nationalism it is important to understand the relationship between the United States and Mexico. I approach this relationship through a discussion of the North American Free Trade Agreement (NAFTA). Mexico has a close economic relation with the United States (US). The role of the energy sector in the NAFTA has been controversial at times with discursive practices that include an anti-west position.

The polarization of the energy debate in the NAFTA framework has special relevance within the Mexican national identity. Most Latin American countries have a historically generalized anti-west attitude. This attitude is based on cultural differences, and the perception of US's economic and military power as a threat to sovereignty for Latin American countries. In the case of Mexico, Britton (2006) argues that the cultural and political relationship between US and Mexico has fluctuated throughout time.

Anti-west attitudes are present within the resource nationalism discourse on energy policy. Regardless of US being the main commercial partner of Mexico. A market oriented

energy policy within the framework of NAFTA has been perceived as a threat to sovereignty. Saxe-Fernandez (2006) criticizes market-oriented energy policies, arguing that the inequalities between the US and Mexico would provoke a disadvantage in the Mexican oil industry, leaving the country in a vulnerable position.

Adamczewski (2007) analyses energy security in North America with a special focus in the NAFTA agreement. Adamczewski explores, through a constructivist lens, the differences between the national identities and how these differences create distrust among the members of the agreement. The NAFTA agreement is based on principles of free market, but the energy sector is an exception of this.

Wendt (1992) explains that the intersubjective understandings between states conforms interests and identities. Therefore, if US and Mexico perceive their differences instead of their similarities or common goals, creating a mutual trust would pose a challenge. Wendt (1995) determines three basic aspects of social structures: shared knowledge, material resources and social practices. Institutions represented by the relationships and interactions between individuals, are shaped by the identity and knowledge of the actors. Which means that actors construct the structures based on their knowledge and ideas. Adamczewski suggests defining common objectives and developing shared knowledge and institutional identity in order to increase the benefits of the NAFTA agreement.

Rodriguez – Padilla (1996) discusses the political polarization during the Salinas de Gortari administration (1988-1994). When Mexico signed the NAFTA agreement, most economic sectors opened up to liberalization of the market, with the exception of the energy sector. Rodriguez–Padilla suggests that this could have been a strategy to legitimise political power. Given that the Mexican presidential elections of 1988 were highly questioned, the president displayed an image that promoted the national interests, choosing oil as the best tool for this purpose.

Roff, Krajnc and Clarkson (2003) analyse the energy policy approach of the NAFTA member states: Canada, US and Mexico. Roff et al. discuss the negative effect of subsidies in the fossil fuels within the NAFTA framework. Even though the three countries have different energy policies, they all seem to continue with a traditional approach. Roff et al. state that the NAFTA agreement seem to encourage fossil fuel subsidies, which simultaneously prevents the investment on renewable energy sources.

NAFTA is a framework of international trade that highly benefits Canada, US, and Mexico. However, the attitudes towards the energy sector pose a challenge, given that energy practices continue with traditional approaches. NAFTA presents an opportunity to cooperate in the production and consumption of renewable energy. In the following section I provide an overview of the energy sector in Mexico.

4.5 The Energy Sector in Mexico

In this section, I provide an outlook of the energy sector in Mexico. I begin the discussion with an explanation of the political system in Mexico. I continue with the structure of the energy sector and relevant figures, including energy mix as well as, hydrocarbon and renewable energy dynamics. I finalise with a discussion of the sustainability of the energy sector and the main opportunities for improvement.

4.5.1 Political System in Mexico

In this section, I provide an overview of how energy, and climate change policies are developed, as well as reviewing the political context. The legislative process in Mexico is conducted by the president and the Congress. The Congress consists of two chambers: The Senate and the Chamber of Deputies. The Senate is the higher chamber and has 128 senators.

The lower chamber consists of 300 deputies. Two out of three representatives are elected and the remaining are assigned from regional lists from political parties.

Only the president and the Congress can introduce a law. Commonly the president presents a proposal of law to the chamber of deputies. When approved the law goes to the higher chamber for final approbation. After the law is finally approved or included amendments, it is enacted when published in the official gazette.

Coppedge (1998) explores the diversity of party systems in Latin America. Coppedge argues that party systems in Latin America are dynamic and change with every election. Therefore, it is difficult to establish a one rule for all. There are some specific aspects that can be analysed such as level of institutionalization and fragmentation. The levels of institutionalization can be understood through analysing electoral volatility, governmental seats held by party, partisanship, engagement of parties with external organisations and legitimacy.

Dalton and Weldon (2007) argue that attachment or feeling of closeness to a political party is an indicator of partisanship. They assert that in the social learning model, individuals learn the political preferences from their parents, which then the individuals reinforce throughout time. However, this model does not represent a homogenised representation of partisanship dynamics across countries. The differences across countries rely on cultural norms and national identities.

Mexico is a democratic country with a multi-party system. The parties with the historical majority of vote share are Institutional Revolutionary Party (PRI), National Action Party (PAN) and Democratic Revolution Party (PRD). PRI was the *official party* for over seventy years. However, since the year 2000 the political landscape has changed. Coppedge argues that political parties that have clear principles in an array of issues are considered ideological. The ideology of a party can be in the spectrum from left to right however, the

left-right definitions can vary in different locations and times. Which means, a party can evolve in its ideological position.

During elections, votes can be polarized, unimodal or flat. In a polarized election, votes are divided in a bimodal spectrum showing a clear divide, an example of this is the Mexican presidential election of 2006. In the unimodal, there is a significant tendency towards a single point in the spectrum. In a flat election, the votes are evenly distributed in several points of the spectrum. Roberts and Wibbels (1999) aim to understand electoral volatility in Latin America through the analysis of economy, institutions and structures and found that economic performance has high influence in electoral volatility.

The legislative process in Mexico is a privilege of the political elites. Hence, it is crucial to understand the source of their political stands in energy and climate change policy. Gaining this knowledge would advance the understandings on decision making.

4.5.2 Structure of the energy sector

The ministry of energy controls the energy sector in Mexico, it designs energy policy, strategies, and instruments. The primary state-owned companies in the energy sector are Petroleos Mexicanos (PEMEX) and the Federal Electricity Commission (CFE). PEMEX controls the exploration, production, distribution and commercialization of hydrocarbons. CFE controls the production, distribution and commercialization of electricity.

According to the national energy balance (SENER, 2013a; 2016) the production of hydrocarbons constituted 88.5% of the energy mix in 2012 and 87.2% in 2015. The proportion of hydrocarbons in the energy mix decreased 1.3% but still represents the overwhelming majority of energy production. The production of renewable energies is increasing, but still represent a small part of the energy matrix. In 2012 renewable energies amounted for 6.9% of the energy production and increased to 9.3 in 2015 (SENER, 2013a;

2016) The previous percentages show increased efforts to produce energy from renewable sources, however the production of renewable energy in Mexico falls below the world's average, which is 14 % of the total energy production (SENER, 2016).

The national consumption of energy in Mexico divided by transportation, industry, residential, and agricultural sectors. In 2012, transportation amounted to 47% of the consumption and 46.4% in 2015. Industry represented 31% in 2012 and 31.4% in 2015. Residential consumption slightly decreased from 19% in 2012 to 18.7 in 2015. Finally, the agricultural sector amounted for 3% in 2012 and 3.5% in 2015 (SENER, 2013a; 2016). The previous figures show the continued relevance of the transportation sector in the consumption of energy. Thus, a transition towards low emissions transportation systems can have a profound impact in the achievement of the goals of the general law of climate change.

The financial report of PEMEX showed that in 2011 PEMEX had a tax burden of 56.1%, which represented 101.6% of its revenue. The tax burden left PEMEX with a net loss of MXN \$106.9 millions (PEMEX, 2013). Oil related taxes represent 37% of the federal income, which shows dependence on oil income (Medina-Ross et al., 2005). Medina Ross et al. suggest that the national companies should have financial and operational autonomy in order to increase their efficiency.

Hydrocarbons remain the main source of energy. Mexico produced 132,183 tons of crude oil in 2012, and has approximately 11.1 billion barrels of oil reserves, which places it as the 18th largest in the world (IEA, 2013). Mexico might have the 8th largest tight oil resources globally about 13 billion barrels. With these reserves, Mexico has the potential to halt its decade-long decline in oil production (BP, 2014).

Oil production declined by 20% from 2005 through 2009. Production has fallen by roughly 1% per year since 2005, in part due to inefficient infrastructure. Most of Mexico's production, around 75% is found offshore in the Bay of Campeche. The main fields are Ku-

Maloob-Zaap and Cantarell. Ku-Maloob-Zaap production has been on the rise since 2006, reaching almost 864,000 barrels per day at the end of 2013. Ku-Maloob-Zaap has replaced part of Cantarell's decline (IEA, 2013).

According to the national energy strategy (SENER, 2013b) the three main goals of energy policy are sustainability of the sector, energy efficiency and energy security. The measures suggested are mainly related to oil production, refinery, and processes of energy generation. A specific measure of the energy policy is to improve transport, storage, and distribution systems because the energy transportation systems have insufficient capacity and show signs of obsolescence. Another measure of the energy strategy is energy transition, to increase the usage of renewable energy sources and clean technologies.

The work of Melgar (2010) presents an analysis of the energy sector and the dilemmas to achieve an effective reform. Melgar uses the case of the reform in 2008 as advancement in the political debate due to the inclusion of academics and specialists as advisors in the debate. However, there were important shortcomings on the final agreements of the reform in terms of contents and implementation.

Melgar points out a key issue in the energy sector. Melgar argues that the political elite believe that a sustainable energy sector can be reached with small changes in the sector. However, there needs to be a substantial change, where the country "Rethinks its very essence" (Melgar, 2010, p108) and changes the conceptualization that defines the energy sector.

On December 20, 2013, the administration of Enrique Peña Nieto passed an important energy reform that allow the participation of the private sector in the energy sector. The participation of the private sector in the energy sector was not allowed since 1938. This energy reform has the potential to increase the energy production and improve economic competitiveness in Mexico (SENER, 2014).

For the purposes of this thesis the analysis of the energy sector covers until the end of the presidential term of Felipe Calderón in 2012. However, I present an overview of the changes in the energy reform of 2013, to give a perspective on the changes of the energy sector. The purpose of the energy reform of 2013 was to produce more and cheaper hydrocarbons by allowing the private sector to invest in activities such as exploration and extraction of oil. The companies may not own land from communities for exploration and development, but rather temporarily occupy land and compensate its owners.

An objective of the reform is to transform PEMEX into a productive state enterprise with an autonomous budget and a board of directors that does not include union representatives. The private sector is allowed to participate in the extraction and production of hydrocarbons, but most of the revenues would go to the state. This allows the state enterprise to become more productive while maintaining state ownership of subsoil hydrocarbons resources.

The energy reform allows the participation of the private sector in non-essential activities such as opening refining, transport, storage and natural gas processing. PEMEX is more independent of the state, but must adopt internal reforms. The tax burden of the state company is reduced to a 65% rather than a previous 79%. The monopoly of PEMEX on retail gasoline and diesel sales ended in 2016

4.5.3 Sustainability

Sheinbaum-Pardo et al. (2012) present an evaluation of the sustainability indicators and energy policy in the Mexican case. They include an approach to measure energy sustainability. This comprehensive analysis presents indicators developed by organizations including the United Nations Economic Commission for Latin America and the Caribbean (CEPAL) and the Latin American Energy Organization (OLADE).

The methodology to develop the analysis of Sheinbaum-Pardo et al. consists of determining the average of eight different social, economic and environmental indicators of the energy sector, where 1 is the most sustainable to achieve and zero 0 the least sustainable. Each indicator has its own ratio, based in data such as gross domestic product (GDP), oil exports and imports, investment with and without debt, and energy imports among others. The evaluation was made from the years 1990 to 2008.

The indicators analysed include autarky, robustness, exports / GDP, oil income / total income, investment with own resources, productivity, electricity coverage, coverage of basic energy needs, relative purity, renewable energy sources and depletion of fossil fuels. Unfortunately, the result of this energy sustainability evaluation decreased from 0.73 in 1990 to 0.56 in 2008. These figures revealed an economic vulnerability due to the oil dependence of government income, a lack of investment and increasing emissions of CO₂.

Among the findings, Sheinbaum-Pardo et al. state that the reforms made before 2008 have not been effective, the Mexican energy policy does not promote energy security, independence of oil sector for public finances and growth of renewable energy resources; hence the sector has a trend to become even less sustainable.

One of the main objectives of the general law of climate change is the reduction of greenhouse gases emissions. PEMEX is responsible for 10% of the greenhouse gases emissions in Mexico (PEMEX, 2011) and two thirds of the greenhouse gases emissions are related to the energy sector (SENER, 2013a). Johnson et al (2009). found that there is a great potential in the oil and gas industry to reduce emissions of greenhouse gases by reducing the losses in the gas distribution system, investing in refineries and petrochemical plants, and increasing the efficiency of the industry. In order to make these changes the industry requires a regulatory framework that allows the company to sell the surplus of energy, among other changes.

Brooks and Krugman (1990) present some suggestions and directions for policy research towards the relationship between energy and environment. Brooks and Krugman argue that energy availability does not guarantee development but development can be achieved by a number of factors, such as: efficiency in the sector, equity in the access, and self-reliance in the decision making of the energy sector.

Additionally, Brooks and Krugman consider a distributed mix of renewable energy sources, which is less environmentally damaging than an intensive exploitation of non-renewable resources. Furthermore, the government should demonstrate environmental concern when considering energy policies. An important aspect to consider in the policy making process is to research specific social, cultural, behavioural and attitudinal characteristics of individuals, groups and communities involved in energy policy, which are crucial in the development of an effective energy policy. Social and cultural aspects are mainly important among communities and groups that are going to be affected by the policy changes, because it can determine obstacles in the policy implementation. This factor of their work is especially relevant to the Mexican energy sector, due to the relationship between the sector and culture.

The general law of climate change stated the gradual reduction of subsidies in the energy sector with the ultimate aim of reducing carbon emissions. This represents an increase in the price of oil-based products such as gasoline, which has a negative effect in the public opinion. Scott Andretta (2011) analysed energy subsidies in Mexico, which form an important part of the economy and attempts to reverse subsidies are always followed by negative public opinion. Particularly when subsidies to fuel are reversed, public opinion shows dissatisfaction over the *gasolinazo*, which is commonly used term for the increase on fuel price.

According to the review of the energy sector, there is potential for improvement and potential to achieve sustainability. However, the main challenge is to shift the focus from hydrocarbons towards renewable energy. Among the points to address are the following:

1. Reduce federal economic dependence on oil based income.
2. Improvement of infrastructure to produce and process secondary energy sources.
3. Improve financial efficiency of PEMEX.
4. Reduce tax burden on PEMEX
5. Increase capacity and modernize energy transportation systems.
6. Increase investment in research and development.
7. Increase production and consumption of renewable energy.

The general law of climate change provides a legislative framework to address some of the previous points, as I discuss in the next section. Therefore, an effective application of the general law of climate change is crucial to achieve a sustainable energy sector.

4.6 Climate Change Policy

The general law of climate change is a landmark on climate change legislation in Mexico. The general law of climate change sets a legal basis to produce a strategy that is focused on adaptation and mitigation of climate change. In this section I present the precedents of the general law of climate change, including the international agreements in which Mexico has participated and domestic legislation that preceded the general law of climate change. I finalize with the structure, institutional framework, and the specific objectives of the general law of climate change.

4.6.1 Antecedents

In this subsection, I present the background of the general law of climate change. I explore the efforts on international cooperation, treaties and conventions. I move on to describe domestic precedents, including legislation that Mexico has enacted in order to mitigate and adapt to climate change.

Mexico has been an active participant in the international community, throughout the journey to mitigate climate change. In 1992 Mexico signed the United Nations Framework Convention for Climate Change (UNFCCC), which took effect in March 1994. As part of the commitment to the climate change mitigation, Mexico signed the Kyoto protocol in June 1998. The Kyoto protocol includes as objectives the reduction of greenhouse gases emissions, enhancement of energy efficiency, in addition to research and promotion of renewable energy.

On April 16th, 2009, former President Barack Obama and former President Felipe Calderón announced the Bilateral Framework on Clean Energy and Climate Change. The aim of this framework is to jointly develop clean energy sources and encourage investment in climate-friendly technologies. The specific objectives include, enhancing renewable energy, combating climate change, and strengthening the reliability of cross-border electricity grids (Congressional Research Service, 2014).

In November 2010, Mexico hosted the Cancun summit. During this convention, Mexico compromised on taking specific actions to reduce the emission of greenhouse gases. Among the agreements of the Cancun summit, Mexico committed to the creation of a green fund for the climate and a framework for adaptation. Torres (2014) argues that Mexico faces a dilemma, where the international commitments present a responsibility on climate change mitigation, but the focus on economic growth represents a challenge towards the real action that can be taken to mitigate climate change.

The domestic legislation on climate change has its earliest precedent in the general law of ecologic balance and environmental protection, which was published in 1988. In 1996 the general law of ecologic balance and environmental protection was modified to include the agreements of the Rio conference from 1992. The modifications included the addition of financial and regulatory instruments. At this stage, the legislation on climate change was based in a structure of permits, inspections and sanctions. This legislation gave fiscal incentives to the use of technology that would reduce greenhouse gases emissions (Congreso de la Union, 2012a).

In 2007 the general law of ecologic balance and environmental protection was reformed to include the definition of climate change and established a framework for the development of policies that would include preventive measures for climate change. The modifications to this law included a legal basis to take political action towards the prevention of the effects of climate change. In 2011 the general law of ecologic balance and environmental protection was reformed again to give the federation the faculties to establish and promote actions and mechanisms to prevent and mitigate climate change (Congreso de la Union, 2012a).

2008 was a landmark year in the legislative advances for energy transition, with the enactment of three laws on this topic. Firstly, the Law for the Use of Renewable Energies and Financing the Energy Transition. The objective of this Law is to regulate the use of renewable energy and clean technologies to generate electricity (Ley para el Aprovechamiento de Energías Renovables y el Financiamiento de la Transición Energetica., 2013). Secondly, the Law for Sustainable Energy Use which enables the development of schemes and research on sustainable energy use. Thirdly, the Law for Bioenergy Promotion and Development which encourages the production and use of biofuels, as a mean to reduce greenhouse gases emissions.

In the previous discussion, I examined the precedents of the general law of climate change. I presented the domestic developments in climate change policy, which have a strong influence from the agreements in the international arena. In the following section, I present the structure of the general law of climate change. I give an overview of the aims and mechanisms to achieve its objectives.

4.6.2 General law of Climate Change

The most important policy instrument that Mexico has to withstand climate change is the general law of climate change. This law clearly determines the scope and content of national climate change policy. The general law of climate change defines the obligations of the state and the institutional mechanisms to address this challenge. In the following discussion, I review the institutional framework, the strategies and goals of the general law of climate change (Ley general de cambio climático, 2012).

The general law of climate change determines the establishment of the climate change national system. The purpose of the climate change national system is to achieve an effective coordination between different levels of government, private and social sectors, as well as the general public. The climate change national system aims to promote synergies to jointly confront the vulnerability and risks of the country to climate change. A priority of the climate change national system is to identify actions for mitigation and adaptation to climate change. The climate change national system is integrated by: The national institute of ecology and climate change, the council on climate change, the inter-ministerial commission on climate change, the states, associations of local authorities, and the Congress.

The inter-ministerial commission on climate change coordinates the actions among the federal ministries in climate change issues. The objectives of the inter-ministerial commission on climate change are to develop national policies and programs to mitigate and

adapt to climate change. It is also the inter-ministerial commission on climate change responsibility to incorporate the programs on climate change within the public policies and finally to develop the national strategy on climate change. The national institute of ecology and climate change is responsible for the scientific and technological research on climate change. The national institute of ecology and climate change coordinates the collaboration between academic and research institutions within the private and public sector. The C3 is a consultation institution whose members are from the private sector and academia amongst others and the responsibility of the C3 is to advise the inter-ministerial commission on climate change on matters of climate change.

The strategic framework of the general law of climate change includes a series of instruments to plan, finance, regulate, and evaluate the actions deriving from the general law of climate change. The main instrument of planning is the national strategy of climate change, which defines the responsibilities of the institutions previously mentioned. The national strategy of climate change establishes the plan of action on climate change adaptation and mitigation. The main instrument of financing is the Fund for Climate Change, which finances the institutions established under the general law of climate change, and related programs. The instruments of regulation include a wide range of control mechanisms, such as emissions inventory, official norms, the national registry of emissions, in addition to fiscal and financial instruments.

The objectives of the general law of climate change are divided in two themes, adaptation and mitigation of climate change. This law is aimed at reducing the vulnerability of human and natural systems of the country due to the effects of global warming. The general law of climate change regulates gas emissions and greenhouse compounds, mainly derived from burning fossil fuels. The general law of climate change establishes as objectives:

1. Competitive energy transition to low carbon emissions.
2. Regulation of emissions and greenhouse gases compounds.
3. Collaboration between the federation, the states, and municipalities.
4. Regulation mechanisms for mitigation and adaptation.
5. Promotion of education, research, development, and technology transfer.
6. Mechanisms for the inclusions of gender equality perspective and inclusion of civil society, private sector, academia, youth, and indigenous communities in the decision-making process.
7. Financial design and promotion of economic and fiscal instruments.
8. Preparation of budget estimates for adaptation and mitigation to reduce the Mexico's vulnerability.
9. Formulation of a policy on climate change in line with the National Development Plan, state programs and other applicable laws.
10. Evaluation and monitoring mechanisms to implement this law.

The specific goals of the general law of climate change set the target of reducing emissions by at least 30% by 2020 and 50% by 2050 compared to the levels of the year 2000. Meeting these goals means to reduce emissions from the energy sector, which account for 66% of greenhouse gases in Mexico.

The general law of climate change has set principles that define the approach that the mechanisms and instruments for climate change adaptation and mitigation need to include. These principles define the responsibility of society and the state towards the environment alongside their actions on climate change issues. The principles of the general law of climate change encompass, environmental responsibility and conservation, integrity, social participation, transparency and access to information.

The national strategy of climate change establishes the objectives of the general law of climate change and divide them in more specific actions for the national policies on climate change. The area of adaptation, the national strategy of climate change has three main goals.

1. Reduce the vulnerability and increase the resilience of the social sector towards the effects of climate change.
2. Reduce the vulnerability and increase the resilience of the strategic infrastructure towards the effects of climate change.
3. Conserve and use in a sustainable way the ecosystems and the services ecosystems provide.

In the area of mitigation, the national strategy of climate change has five main goals.

1. Expedite the energy transition towards clean energy sources.
2. Reduce the energy intensity with mechanisms of efficiency and responsible consumption.
3. Switch to sustainable cities models, that include construction, transportation and waste management systems with a low carbon footprint.
4. Promote better agrarian and forestry practices in order to preserve the natural carbon sinks.
5. Reduce short life contaminants to increase the wellbeing of the general population.

According to the previous objectives, public policies should promote the reduction of greenhouse gases emissions, increase efficiency in the generation and use of energy, promote the substitution of fossil fuels towards renewable energies, and use market instruments to promote the transition towards a sustainable and competitive economy. The goal that represents the biggest challenge to achieve is to expedite the energy transition towards clean energy sources.

In Mexico, as I discuss in later chapters, the debates on energy policy focus mostly on oil production and PEMEX. The political debate marginally touches the problems of the electricity sector and its opportunities for transformation. Mexico has a great potential for renewable energies, such as solar and wind power. The main challenge that Mexico faces in order to achieve the objectives of the general law of climate change is to promote the development of renewable energies. The general law of climate change represents a great commitment towards climate change mitigation and adaptation. If Mexico fulfils the goals on reduction of greenhouse gases emissions, Mexico would become an outstanding leader in the international community on the fight against climate change.

Conclusions

In this chapter I have given a discussion and overview of resource nationalism, the Mexican energy sector and climate change policy. The discussion of resource nationalism provided a regional background of resource nationalism in Latin America that highlighted similarities in the discourse, such as sovereignty and anti-west attitudes. Similar positions were introduced in the discussion of the NAFTA framework. To proceed with the analysis of resource nationalism, I provided a review of the literature of resource nationalism in Mexico. This discussion establishes the geopolitical context of resource nationalism in order to have a framework of reference for the analysis of the case of Mexico presented in the following empirical chapters.

I continued this chapter with an outlook on the energy sector. The figures show that while there has been an increase in the production of renewable energy, the energy sector continues to be dominated by the production of hydrocarbons. The energy sector has potential for improvement, but it is crucial to move the economy towards renewable energies.

I concluded this chapter with an overview of climate change policy. I presented the international and domestic precedents of climate change policy in Mexico. I finalized this section with a review of the structure and goals of the general law of climate change. This discussion introduced the precedents, and specifics of climate change policy, which is fundamental to analyse the main research question: How does the resource nationalism discourse pose an obstacle for climate change policy? After the review of the structure and objectives of climate change policy, in the following chapter I begin the analysis of the resource nationalism discourse, by analysing the historical construction of resource nationalism.

Chapter 5. The Historical Construction of the Resource Nationalism Discourse

The resource nationalism discourse emanates from a crucial time in Mexican history. After the struggles of the Mexican revolution of 1910 and the following years of stabilisation, the government of Mexico undertook a series of changes that required a strong political direction. During the presidential term of Lázaro Cárdenas there was a need for a strong symbol that would unite a diverse and highly divided society. The nationalisation of oil was the perfect strategy, and would later become a symbol of national identity. The oil nationalisation served to legitimise the political regime in the international arena and recognize the self-determination of the Mexican state. Domestically, the oil nationalisation simultaneously legitimised the political regime and united society to fight against foreign intervention. The effects of the oil nationalisation reverberated deeply within the population due to the resentment that foreign exploitation created since colonial times. Consequentially, oil was embedded to sovereignty and became a cornerstone in the construction of the national identity of contemporary Mexico.

The energy sector in Mexico plays an important role in the economy and in the cultural heritage. In order to understand the nationalist discourse regarding energy policy, we have to understand the history of Mexico and how certain elements of the national identity were constructed. In this chapter I analyse the historical construction of resource nationalism. Wodak et al. argue, “Historical or mythicised recollections which are stored in the collective memory of social groups are of particular importance for the construction of a national identity” (Wodak et al., 1999, p157) I argue that the oil nationalisation of 1938 became a mythicised recollection in the collective memory, it became a symbol of national unity and was an important element in the construction of a national identity. This chapter is divided in

four sections: historical context, sociopolitical context, lexical and inter-textual analysis and finally, critical analysis.

In the first section, historical context, I introduce the early precedents of resource nationalism. I explore the struggles of Mexican people to define a national identity including the fight for representation in the courts of Cadiz, where we can find an early antecedent of the relationship between natural resources and sovereignty. I continue to describe the context and aftermath of the Mexican revolution, which left a discontented and divided society. I finalise with a discussion of the political atmosphere before the oil expropriation, such as the formation of the National Revolutionary Party (PNR) also known as the *official party*.

In the sociopolitical context, I analyse the government of Lázaro Cárdenas and its social context, including the structural changes in the government and the political approach of Cárdenas during his presidential term. In the lexical and inter-textual I present an analysis of documents relevant to the resource nationalism discourse, particularly the oil nationalisation. The documents analysed were produced during the presidential term of Lázaro Cárdenas from 1934 to 1940. The main documents from the corpus come from the *Diarios de Debates* which are the debate diaries of the Congress, as well as speeches from the president Lázaro Cárdenas and publications from magazines such as *El Economista* and *Hoy*.

In order to reconstruct the diverse perspectives of resource nationalism during this period of time, I analysed further documents such as letters from ambassadors, manifestos from the former governor of San Luis Potosi, Mateo Hernandez Netro and manifestos from the group Mexican Revolutionary Action (ARM). The documents analysed included perspectives from actors that were in favour and against Cárdenas' policies.

The analysis is based on the discourse historical approach form critical discourse analysis, mainly inspired from the work of Ruth Wodak and Martin Reisgl, which I discussed in chapter three. The interpretation from the lexical analysis presents the strategies used in

relevant texts from the oil expropriation. A description of the lexical strategies can be found in Annex 1. The inter-textual analysis refers to the similarities or fields found within texts and their context.

To finalize this chapter, I present a critical analysis. As the discourse historical approach suggests, in order to understand the meaning of the lexical analysis it is important to have an understanding of the socio political and historical contexts (Reisigl and Wodak, 2009; Wodak, 2011). Hence, my interpretation of the resource nationalism discourse links the oil nationalisation, the colonial precedents, the Mexican revolution of 1910, the origins of the National Revolutionary Party (PNR) and the government of Lázaro Cárdenas. In this critical analysis, I use the elements of the discourse historical approach: immanent, socio-diagnostic and prospective critique (Glynos et al, 2009; Forchtner, 2011; Wodak and Meyer, 2009). I achieve this analysis through the review of the links between the lexical and inter-textual analysis, the sociopolitical context, and the historical context.

5.1 Historical context

Mexico has a complex history; contemporary Mexico comes from a clash of cultures. On one side, it has roots in the diverse native cultures of the region, which flourished before the colonisation of America. On the other side, it is rooted in its Spanish origins, since their arrival to Mexico early in the sixteenth century (Salas, 1963) when a new culture was born. In this section I begin by discussing the relevance of the colonial struggle to the later construction of resource nationalism. I follow with the years of the revolution of 1910 and finalize with the early governments of contemporary Mexico until the election of Lázaro Cárdenas in 1934.

5.1.1 Early precedents of the resource nationalism discourse

Given the violence and struggles that came with the Spanish colony, the new culture was destined to be in constant search for its own identity. After the arrival of the Spanish, a new structure of castes was introduced, having the indigenous people as slaves and lower caste of society. The Spanish-born people who lived in Mexico were on the other end of the spectrum. The middle castes were composed by people who were descendants of different races, they were categorised in the castes system according to their ethnic origin: *mestizos* descended from Spanish and indigenous people, *mulatos* from Spanish and African, *zambos* from African and indigenous, *castizos* from Spanish and *mestizos* respectively, among many others. Castes determined the ethnic origin of the individual and consequentially their status in society (Chorba, 2007).

The process of *mestizaje* created complex social and race relations. These relations created a differentiation on the legal framework towards the diverse colonial society. With the process of *mestizaje* and the illegitimizing of offspring, the ethnic genealogy of an individual was unlikely to be traced, consequentially the differentiated legal framework became obsolete. However, the institutionalized discrimination over skin colour prevailed (Morner, 1966). As the *mestizos* became a significant part of the population in Mexico, the link between ethnic origin and social status became a conflicting part of the shared identity (Lund, 2008).

The Napoleonic invasion of Spain was a precedent of the social unrest in Latin America, which sparked questions about the legitimacy of the Spanish crown over the Spanish empire. In the early 1800s people started to demand greater equality and representation. As revolts and fights became more common in the Nueva España, the debate for representation and equality in the Americas quickly raised in the courts of Cadiz (Guerra, 1994). Rights of citizenship and representation in the Spanish Congress were discussed in the

courts of Cadiz, at this point the consulate of Mexico sent a memorial to the Congress asking for an increased representation of deputies for the Spaniards living in the Nueva España. However, the memorial argued against representation of the castes and indigenous people. The utterances from the consuls show the attitudes towards castes and indigenous people in the Americas, who are referred to as *indios* (Cavo, A., and Bustamante, C., 1836).

The unfortunate *indio* ... without property in his name or in his family, without maintenance, clothing, shelter, without physical or moral force, without hope or despair, without compassion or tenderness for the neighbour, without attachment to life, destitute of all the feelings of nature; and similar in the end, to an unclean animal, wallowing in the mud of the impudent sensuality, the continuous drunkenness and the more apathetic laziness. (Cavo, A., and Bustamante, C., 1836, p. 355)

The previous statement presents indigenous people without the most basic qualities of humanity, which given the context aims to justify the inequality of rights and representation. The over lexicalisation or repetitive use of adjectives to describe native people exemplifies how indigenous representation was a highly conflicted issue for Spanish people in the Nueva España, because they would see their position and influence reduced. Similarly, the following example illustrates how the consuls present the castes in a similar light to the indigenous people.

The reciprocal and forced contact between Spanish, *indios* and blacks, and from the mixtures of their offspring proceeded the extraordinary diversity ... of castes, and that under the slight and imperceptible nuances of colour, they are perfectly identical with each other, and not at all unlike the legitimate *indios* ... two million castes are of the same condition, of the same character, of the same temperament, and of the same negligence of the *indio* ... drunk, incontinent, lazy, without modesty, gratitude or fidelity: no notions of religion and morals, without luxury, cleanliness, or decency, seem even more machined and dishevelled than the *indio* himself. (Cavo and Bustamante, 1836, p. 362)

The memorial from the Mexican consulate sparked a fierce debate in the Spanish Cortes, advocates for equal rights such as José Mejía Lequerica argued in favour of equality challenging the *impurity* of slaves' blood and acknowledging their humanity and their rightful need for equal rights and representation (King, 1953). The debates over

representation revealed a link with the exploitation of natural resources, particularly a link with mining.

During the time of the viceroyalty of the Nueva España, the exploitation of the mineral resources played a very important role in the economy. The resource extraction from minerals such as silver and gold was a significant element in the economy of Spain. The minerals taken from Mexico to Spain contributed to the economic power of Spain (Cárdenas, 2013; Svampa, 2013). The extraction of minerals simultaneously contributed to the exploitation of the indigenous people and other castes in the society of the Nueva España. The relationship between the extraction of natural resources and the exploitation and oppression of certain sectors of society (Azama, and Ponce, 2014) became an early precedent of the fight against foreign exploitation by developing protectionism over natural resources. Acosta (2013) argues that within a neo-extractive economy, developed countries still play an important role in the industry and it is reproducing the main elements of colonial extractivism.

When the courts of Cadiz allowed the Americans to make their petitions, they included equal representation, free trade, free cultivation of crops and free exploitation of mercury mines, among others (King, 1953). During the debate over representation, the argument from Jose Simeon de Uria on the session of September 4, 1811 rejected the exclusion of the castes from gaining representation, given that they contributed to the sovereignty of the nation and “provide the hands to cultivate the soil ... dig from its core ... the silver which activates trade” (Congreso de los Diputados, 1811a, pp. 3-4).

Continuing with the debate, when addressing the subject of what constitutes merit in order to grant citizenship, Deputy Gordoia recalls the mining code and state “given the precious products of this trade, which is the main source of public joy ... miners deserve all the mercy and privileges given by the kingdom” (Congreso de los Diputados, 1811a, p. 9).

Then Mr. Gordoá rhetorically asks if people of the Americas, who devote their life to this trade, earned enough merit to be granted citizenship. Continuing in the debates over equal representation, during the session of September 14th, 1811 deputy Mendiola affirmed:

Sovereignty resides in all of the nation, is the sum of all rights ... and given that the nation is integrated by all Spaniards in both hemispheres... all citizens should have equal rights ... particularly equal representation ... Justice is a constant virtue of giving everyone what they deserve ... Those cities were founded by the hands of those being excluded... castes who decorated the temples with precious metals, castes who extract the metals from the mines, metals, which are the blood of the state (Congreso de los Diputados, 1811b, p. 8)

The deputies' statements illustrate a lexical link between sovereignty and extractivism. Furthermore, it brings to light the significance for people from the Americas, where matters of gaining rights, gaining recognition as citizens, and sovereignty, relate to extractivism. When referring to the importance of the products of mining, the deputies could have chosen words such as economy or progress, however the lexical choice was sovereignty. This is an interesting choice, which relates self-determination of the Spanish empire with extractivism. The metaphor describing metals as the blood of the state shows the importance of extractivism, given that mining was part of the economic structure that fuelled the Spanish empire. However, extractive practices perpetuated an unequal society in the Americas. The self-perceived superiority of some Spaniards translated into the exploitation of the castes and indigenous people. Given that states have to continuously participate in norms to perpetuate self-determination (Wendt, 1992), granting rights and representation to the castes would break the *status quo* between the Americas and Spain. This reveals the meaning of the memorial from the Mexican consulate, which described their reluctance and disdain for that change.

In 1810, Mexico declared its independence from Spain, which represented the end of the contributions of natural resources from Mexico to Spain. In the session of September 18th, 1811 deputy Martínez referred to this matter,

Nature joined the Europeans and creoles, that even if I wanted, I could not separate them; but we are seeing their disastrous disagreements in Mexico and in some other provinces of America, which must be soothed with gentleness, and with prudence. If it cannot be so, by any other means dictated by our imperious need. Nueva España experiences the horrors of an internal war, when we most need their help. (Congreso de los Diputados, 1811c, p.4)

The speeches in the courts of Cadiz illustrate the situation of colonial Mexico and the Spanish dependency on extractivism in the Americas. The structure of castes, the discrimination and lack of rights and representation for anyone who was not Spanish or European born was a source of conflict that sparked the war for independence. After the Mexican Independence war, society changed and had a weak political structure, however a remnant of traditional society still prevailed. It was only on 1836 that Spain recognized Mexico's independence in the treaty of Santa María-Calatrava (Secretaría de Relaciones Exteriores, 1927).

5.1.2 Post-Independence context

The decades following Mexican independence were characterised by conflict between several political factions who struggled to stabilize and legitimise the government. Agustín Iturbide who proclaimed himself emperor of Mexico in 1814, was executed by the later first elected president, Guadalupe Victoria in 1823. This event deepened the division between factions. In 1833 Antonio López de Santa Anna, former ally of Iturbide, became president. In 1846, the United States declared war to Mexico and Santa Anna effectively sold almost half of Mexico's territory to the U.S for 15 million. In 1861, the first indigenous president Benito Juárez was elected. In 1876 Porfirio Díaz led a military *coup* against Juárez' successor Sebastián Lerdo de Tejada, and became president in 1877. Díaz essentially ruled until 1911, with an exemption from 1880 to 1884. (Bethell, 2001).

Díaz accomplished a degree of political stability and economic development never seen after the Mexican independence in 1810. That political stability and economic

development made Mexico a safe country for foreign investment. Foreign capital flowed freely into many sectors of the national economy, including, railroads, mining and oil industry (Gonzales, 2002). However, Díaz was president for nearly three decades and many sectors of the population were against his regime. Elites increased their political and economic power while certain parts of the population remained unrepresented and living in precarious conditions. This inequality eventually led to the revolution of 1910.

During the Díaz regime, the mining code from 1884 and the oil law from 1901 gave ownership of the subsoil to the landowners, which allowed private owners the use and exploitation of any products of the land and subsoil, including oil. The government was also allowed to give concessions to foreign investors to exploit the subsoil. During this period, the industry grew with an increased foreign investment.

Francisco I. Madero challenged the authority of Díaz and ran for office in 1910, sparking the start of the Mexican revolution. Francisco I. Madero's project of a nation consisted in embracing the diversity of all social groups with democracy. Madero's short-lived presidency (1911-1913) was followed by the betrayal of Victoriano Huerta who started a *coup d'état*, which culminated with the murder of Madero in 1913 (Krauze, 2006). In the following years, copious political rivalries and struggles for power defined the sociopolitical background.

In 1917 Venustiano Carranza promulgated the Mexican constitution. In the constitution of 1917, article 27 established that the state was the legal owner of the subsoil, and any products obtained from it including water, minerals and oil. Even when this law would not affect the rights of the owners, it established a precedent for the future expropriation law. In 1920 the revolution concluded, leaving Mexico in a state of instability and precarious conditions and left the nation with deep scars of violence and sacrifice (Guerra, 1994; Gonzalez, 2002).

In the aftermath of the revolution, oil was beginning to gain relevance. The oil industry in Mexico started in the last decades of the nineteenth century, however it was not until the beginning of the twentieth century, when the commercial production of oil started to grow. The first oil company, *Mina de Petroleo de San Fernando* was established in Tabasco in 1863. However, this company along with many others did not succeed in the industry. The first company to succeed was *Waters-Pierce Oil Company* which was part of *Standard Oil*. The most important companies in the industry during the first three decades of the twentieth century were: *Mexican Petroleum Company* founded by the American Edward L. Doheny, and the company *Compañía Mexicana de Petroleo El Aguila* founded by the British Weetman D. Pearson (Alvarez de la Borda, 2006).

In 1921 oil production was at its highest point, however after 1923 production started to decline due to a fall in the international prices. In 1925 the president Plutarco Elias Calles decreed an oil law that would put at risk the rights of ownership of the oil companies. However, the Calles-Morrow agreement allowed the companies to maintain their rights, so they could invest in the sector (Alvarez de la Borda, 2006). The industry was in decline due to new oil suppliers around the globe and the companies had to reduce their expenses, which would eventually create discontent among oil workers. The great depression affected oil production, but after 1933 production started to grow again. As the industry increased their production, the conflict also started to grow.

After the struggles of the revolution, a different kind of conflict started, it was a fight for power within the government. By the end of the 1920's, the political scene was starting to stabilise, instead of just popular political figures and governments based on *caudillismo*, institutions started to play an important role in politics. In 1929 Plutarco Elias Calles former president of Mexico founded the National Revolutionary Party (PNR), the predecessor of the Institutional Revolutionary Party (PRI), which remained the official party for over seventy

consecutive years. Calles was known as the *Maximum chief* and had “the power behind the throne” (Bethell, 1991, p. 244). When Lázaro Cárdenas became president in 1934, there was already an ideological polarisation within the party and a growing social conflict among the population (Bethell, 1991).

The fight for power was growing and whoever controlled the party, would control the government. Calles was known to have control over his successors and influenced their decisions. Calles considered that he could influence Cárdenas, as he did with the other presidents, however, Cárdenas and Calles had different ideologies, which eventually created a conflict between them. Cárdenas supported unions and strikes, which was something Calles was against (Krauze, 2006).

The antagonism between Cárdenas and Calles became more noticeable during Cárdenas’ regime, when the institutionalisation of the official party was becoming more important and the control of the party was directly related to the control of the government. Cárdenas had an increased popularity in the ruling party since he was governor of the state of Michoacán, however after he became president he started to isolate the former president Calles and his supporters by not giving them important political positions. The antagonism between Cárdenas and Calles culminated with the arrest of Calles and his deportation to the United States.

In this section I argued that resource nationalism has precedents that go back to colonial times, which are tied to the fight for rights and representation in the Nueva España. The debates from the Spanish Cortes showed a lexical link between sovereignty and extractivism. This link sets an early precedent on the meaning of extractivism as an instrument to achieve self-determination of the nation. Extractivism in the colonial context provided the *merit* for individuals to be acknowledged as equals by their foreign counterparts.

Following the discussion of the courts of Cadiz, I explored the post-independence times. Decades of instability and war lead to the Díaz regime. During this time, there was growth and stability, but there was also great inequality, which eventually lead to the Mexican revolution. Díaz allowed foreign investment in many economic sectors, including the oil industry.

After the revolution, there were political divisions and instability. Many groups were fighting to stay in the government. The formation of the PNR was the start of a political regime that would promote the ideals of the revolution, however after Plutarco Elias Calles founded the party, it seemed that Calles controlled the decisions in the government even after his presidential term. The oil industry in the twentieth century grew to be an industry that would define the nation. At the start of the century, foreign investment was the basis of the industry. After the revolution, the political class became more interested in the industry and the influence of foreign interest in domestic issues. In the following section I discuss Cárdenas' regime, his policies, and the social context.

5.2 Sociopolitical context

In the post-independence context, I discussed the relevant events leading to Cárdenas presidency. In this section I continue with the sociopolitical context during the presidential term of Lázaro Cárdenas. I discuss his government and main approaches including, labour unions support, land reform, and the expropriation law. Finally, I present the context of oil nationalisation. Five aspects highlighted the government of Lázaro Cárdenas: the institutionalisation of political power, socialist education, masses politics, agrarian reform and oil nationalisation (Sosa, 1996). Cárdenas expressed his admiration for the revolutionary

ideal of social justice. He considered that the government should honour the sacrifices of the revolution through policies that would benefit the people (Cárdenas, 1972).

The government of Lázaro Cárdenas changed the course of Mexican politics and represented the start of a power structure that is still present in Mexico. The Mexican revolution left deep scars in the collective memory of the nation. After the revolution, different groups tried to govern the nation and seize power, however they were in constant conflict. Plutarco Elias Calles, former president of Mexico started a regime that would last for many years. However, ideological disagreements lead to an antagonism with the president Cárdenas.

When Cárdenas came into power in 1934, he put in motion a strategy that would set Mexico into a new path. In order to legitimise his regime and gain the support of the nation, Cárdenas had a set of political tactics that would aid him to legitimise his regime. To start the legitimisation process, it was necessary to reduce the influence of the old regime into the government, therefore Cárdenas isolated Plutarco Elias Calles and his supporters in non-influential positions and eventually culminated with the exile of Calles (Gonzales, 2002). In 1938, the ruling party, PNR changed its name to *Partido de la revolución Mexicana* (PRM), which was a step to change the structure once governed by Plutarco Elias Calles. The PRM had four main lines: labour, military, agrarian and popular (Coerver et al., 2004).

Cárdenas government was characterized by his support for labour unions and strikes. He used populism as a tool to gain the support of the working class. His language appealed to the ideals of the unions. The workers felt that the president was talking truthfully with words that were easy to understand, instead of the traditional ideological speeches that were not understood by the labourers (Brennan, 2011). Cárdenas support for labour unions, was a key element to the legitimisation of his new regime. During Calles regime, Cárdenas was

appointed to deal with the strikes in Huasteca petroleum, which lead him to attend to union meetings and gain the trust of oil workers (Santiago, 2006).

In 1936 the confederation of Mexican workers (CTM) was established, and became a cornerstone of the ruling party. The CTM represented around six hundred thousand members, however when the interests of the workers were against the interests of the government it was clear that the CTM would support the government. The labour section of the PRM was closely linked to the CTM, where the ruling party showed favouritism to the CTM, and consequentially undermined any competing independent unions. The PRM essentially determined the legality of the strikes, ensuring the loyalty of the CTM towards the PRM (Snodgrass, 2003).

Former president Plutarco Elias Calles had a conflict with the Catholic Church, which eventually led to the Cristero war in 1926 (Bethell, 1991). When Cárdenas became president, the church-government conflict was still ongoing. For Cárdenas, the influence of the church in education was against the ideals of the revolution, consequentially Cárdenas established the socialist school. In this education system, the church did not have influence, and the students were taught about the collective welfare and the ideals of the revolution. In the socialist school the teachers had a fundamental role in the formation of students, teachers not only provided the students with basic knowledge, they also introduced them to socialist ideals (Cárdenas, 1972). The teachers were organized as the national education workers, which later became the *Sindicato Nacional de Trabajadores de la Educacion*, (SNTE). The SNTE is now the largest teachers' union of Latin America. The SNTE similarly to the CTM became a pillar of the government, which was aligned to the ruling party and transmitted to the students the ideology of the revolutionary nationalism and the PRM (Bensusán, and Tapia, 2011).

Alongside the union's coordination, Cárdenas gained the support of the farmers living in precarious conditions, also known as *campesinos*, with his land reform. Cárdenas' land

reform was unprecedented. The basis of his reform was to redistribute the land held by *terratenientes* or people who owned great amounts of land, to *campesinos*. This reform gave *campesinos* parcels of land called *ejidos* which were communal lands that *campesinos* could work and live in. Cárdenas also armed the *campesinos*, so that they would defend themselves against the *hacendados* who previously owned the land. All land recipients were enrolled into the *Confederacion Nacional Campesina* (CNC), which was later, aligned to the PRM (Tai, 1974). The land reform showed the paternalism in Cárdenas' government, which gave him the nickname of *Tata Cárdenas*, a colloquial word for father Cárdenas.

The expropriation law was the first step towards controlling the oil industry. In November 1936, the expropriation law was enacted, a law that would give the government the power to nationalise any resources that the nation needed. Cárdenas argued that the law's main objective was to give the government the ability to use any dormant actives in order to make them more productive and benefit the population. The expropriation rights were applied in the agriculture sector, the extractive industries and the manufacturing sector (Rippy, 1972).

In 1934 The English, Royal Dutch Shell Company, and the American, Standard Oil Co., were the most important oil companies in Mexico. The industry had around thirteen thousand employees, most of them were members of labour unions. While strikes were common at the time, in 1936 the oil labour unions began the strike that led to the oil nationalisation of 1938. The demands from the oil labour unions involved increase in salaries and better work conditions. However, the discussions prevailed for six months before the announcement of a general strike. The oil industry contributed greatly to the Mexican economy and the government had a great interest in a settlement between the oil companies and the unions. Cárdenas made public his support for the unions and the government became involved in the negotiations (Santiago, 2006).

Cárdenas regime had great support from marginalised sectors of the population, particularly due to the land distribution amongst *campesinos* and his support to labour unions.

In terms of political drama and presidential prestige, the oil expropriation was the high point of Cárdenas years ... From the bishops to the students of the national university, Mexicans rallied to the national cause, endorsing the president's patriotic stance and admiring, probably for the first time, his personal *machismo* (Bethell, 2001, p. 44)

However, there were many groups opposed to his government. These groups included industrialists from Monterrey, railroad workers, military segments, synarchists, the newly formed National Action Party (PAN) and the Anti-communist Revolutionary Party (PRAC) (Navarro, 2010).

In this section I presented the sociopolitical context, which showed Cárdenas' strategy to legitimise his political regime. Cárdenas needed the support of a nation that was clearly divided, in order to legitimise his regime. Hence, he made reforms that would give him the support of the majority of the population. The Mexican revolution was upheld by labourers and *campesinos*. Hence, their support was a fundamental element of the new political regime. Cárdenas expressed his support for labour unions, and the newly created CTM was aligned with the ruling party, which in return gave him the support of the unions. The land reform gave lands to *campesinos* and organized them into the CNC, which was also aligned to the PRM. The education sector, was a key element for an institutionalisation of the new regime, the teachers were organized by a union that was dependant on the official party, similarly to the CTM and CNC. Simultaneously, through the education system the students learned the values and ideals that the government established. The new regime needed less influence from foreign governments, therefore the expropriation law allowed the government to repossess key economic sectors that had major influence in the domestic economy. A final and key element of the new regime was to unite the nation and share the belief that the government would protect the people. Hence Cárdenas used the oil expropriation as a symbol

that would unite the nation and show the protection of the government against foreign exploitation.

The legitimation strategy created a new self-perpetuating system that lasted for several decades. The oil nationalisation was the symbol that tied the political tactics together. The oil expropriation was institutionalized, as an act of nationalism and this non-renewable natural resource continued to symbolize a treasure that needed to be protected. To continue with the discussion of the historical resource nationalism, in the next section I give my interpretation of the lexical analysis of the resource nationalism discourse.

5.3 Corpus Analysis

In the previous section I analysed the legitimation strategy of Cárdenas government, as well as its foundation on the revolution, and the role of the government that preceded him. In this section I present my interpretation of the corpus analysis. In order to do so, I begin with the interpretation of the official discourse which includes the analysis of presidential speeches relating to the oil nationalisation. I continue with an analysis of the supporters' discourse, which includes, the *Diarios de Debates* from the Congress, texts of publications in magazines, such as *El Economista*, and *Hoy*, as well as diplomatic communications with England, Netherlands and the US. I finalize this section with a discussion of the opposition discourse, which includes the analysis of manifestos from the governor of San Luis Potosi and diplomatic communications among others. In each section I explore the core elements that I found in the corpus and give my interpretation of its meaning through the analysis of their lexical choices.

5.3.1 Official discourse

The most relevant documents regarding the oil nationalisation are the manifesto of the President Lázaro Cárdenas regarding the oil expropriation decree of March 18th, 1938, and the speech given to the Congress on September 1st, 1938. The analysis of these texts showed a consistent use of three elements that represent the core of the discourse. The first element is the *nation*, which has a dual connotation. The first approach is used through the lexical strategy of collectivisation, which represents the unity of the people, signifying that all members of society have a common goal. The second approach refers to the nation as a single unit. Through the lexical strategy of personification, the idea of the nation is given human characteristics, such as life and dignity. An example of this approach can be seen in the speech given by Lázaro Cárdenas on March 18th, 1938 “frequently abusing this economic power, often to the point of jeopardizing the nation’s life itself...” (Cárdenas, 1938, p. 4).

The strategy of over lexicalisation was often used in Cárdenas’ speeches. The term of *nation* was frequently tied in with the words justice, peace, dignity and sovereignty: “It is in the best interest of the working class from all industries, that demands it...The sovereignty of the nation would be exposed to the tactics of foreign capital” (Cárdenas, 1938, p. 2). According to the strategies used, I argue that Cárdenas aimed to persuade the public to be united for the common goal of social justice and the defence against foreign exploitation.

The second core element is the *government*, which is presented as a single unit that protects and leads the nation. Through the strategy of personification, the government is also given human characteristics, such as composure and dignity. According to Cárdenas, the government would “subdue oil companies into obedience and subordination” (Cárdenas, 1938, p. 2) in order to protect the nation. The strategy of structural oppositions was key in Cárdenas’ speeches, where two parties are presented as *we* against the *other*. The final core element is *oil companies*, which through the use of structural oppositions play the role of the

other in Cárdenas' speeches. Oil companies are also described as *foreign companies*, which aim to highlight their foreign origin, in order to link it with foreign exploitation. Oil companies represent the enemy that the government and the nation are fighting against. The justification over the structural opposition relies on the inequality of conditions: "Comfort for the foreign personnel; mediocrity, misery and insalubrity for the nationals" (Cárdenas, 1938, p. 4). The companies, a set of multinationals with investors from England, US, and the Netherlands among others, are obscured and represented as a single unit by generalising them by their function as oil companies, through the strategy of functionalisation. The strategies of over lexicalisation and personification are often used when referring to the oil companies. The words used to refer to the oil companies are *perversity* and *defiance*. According to Cárdenas' speeches the purpose of the oil companies are intervention, exploitation and abuse.

The structural oppositions used in Cárdenas' speeches represent an antagonism between the nation and the oil companies. The use of hyperboles and dynamic modalities, where the speaker predicts an event according to the circumstances, Cárdenas describe the likelihood of chaos and anarchy if no one stopped the exploitation of the oil companies. I argue that the message that Cárdenas expressed was a justification for the oil expropriation by appealing to the historical precedent of foreign exploitation. The argumentation in Cárdenas' speeches represented paternalistic qualities of the government, which would protect the nation from chaos and exploitation.

According to the analysis of Cárdenas' speeches, the official discourse can be structured with the following meanings:

- A common goal of society defines the nation. All members of society belong to a nation. All members of society have a common goal.

- Members of society have previously been subject to foreign exploitation. All members of society are against exploitation. The nation has a common goal of justice. The nation is against exploitation and it is fighting to obtain justice.
- Oil companies represent foreign interests. Foreign interests represent foreign exploitation. The nation is against exploitation. Hence, oil companies are the enemy.
- The government delivers the will of the nation. The nation is against exploitation and wants justice. Oil companies represent foreign exploitation. Hence the government protects the nation from foreign exploitation and delivers justice.
- Cárdenas represents the government. The government protects the nation and delivers justice. The nation is all individuals. Cárdenas protects all individuals from foreign exploitation and delivers justice.

In the official discourse, Cárdenas, as representative of the government presents himself as protector of the nation. This self-representation is consistent with the paternalistic approach of his policies. The construction of this image created a mythification around Cárdenas and the oil nationalisation. This idealized image was reproduced throughout the years by the political system assembled by Cárdenas.

5.3.2 Supporters' discourse

The oil expropriation produced a great debate among intellectuals who published their work in magazines, such as, *Hoy* and *El Economista*. Authors such as Agustin Aguiar, and Luis Cabrera published articles questioning the legitimacy of the expropriation. Oscar Rabasa, Antonio Gomez Robledo, Manuel Prado and Jose Mancisidor expressed their support towards the oil expropriation. The debates illustrate different perspectives on the oil nationalisation, which are often obscured in history.

Rabasa was chief of juridical affairs in the ministry of finance. He published a series of articles regarding the constitutional and international legitimacy of the oil expropriation. In his articles, Rabasa gave historical examples and juridical US cases in order to demonstrate the right of a nation to declare an expropriation. He argued in favour of the legitimacy of the oil expropriation according to the international law. Rabasa argued that any civilized country would follow the same principle in order to protect the national resources and promote social welfare. According to his argument, the expropriation was justified by the principles of justice around the world (Rabasa, 1938).

Antonio Gomez Robledo was a lawyer and academic who also published articles about the constitutional legitimacy of the expropriation. Gomez Robledo and Rabasa had similar perspectives and expressed their support to the government through the justification over the right to nationalise the oil industry (Gomez, 1938). In his articles, Gomez Robledo used strategies such as, over lexicalisation, collectivisation and structural oppositions, among others, to justify the interests of the government in the oil expropriation law.

Gomez Robledo discussed the debate between Rabasa and Aguiar. Aguiar Alamada argued that the articles from Rabasa were based on United States law, therefore they should not be considered as a study of the constitutional legitimacy of the oil nationalisation. Furthermore, Aguiar argued that the articles were just an example of official propaganda. Gomez Robledo questioned Aguiar's moral integrity through the strategies of personalisation, which assigns direct responsibility to the individual, and objectification, which degrades individuals by representing them as objects. Gomez Robledo referred to Aguiar Almada as ignorant, and accused his arguments of having bad will. Gomez Robledo argued "All free men, of course have the right to criticize the acts of their government, but only if the criticism is accompanied by honesty of purpose and no hidden agendas" (Gomez, 1938, p. 331).

Gomez Robledo used structural oppositions to evaluate the oil companies and the Mexican people as having no common interests. This argument was based on an assumption of the mental processes of the people. However, according to Gomez Robledo, it was enough reason to decree the oil nationalisation. Gomez Robledo argued that the oil nationalisation was a means to achieve the Mexican ideal of owning their natural resources. Gomez Robledo reproduced elements of the official discourse through the use of collectivisation and structural oppositions. He argued that the oil companies represented the enemy interests of the Mexican people (Gomez, 1938). This argument was based on the official discourse, which represented the position of the government. Nevertheless, positioning the Mexican people in a structural opposition with the oil companies placed the responsibility on the people and aimed to justify the actions of the government.

This analysis shows that Gomez Robledo, as a supporter of Cárdenas policies, tried to justify the expropriation and expressed that anyone who was against it had an ulterior motive and was in consequence an enemy of the nation. Through the use of personalisation and structural oppositions, Gomez Robledo classified Aguiar Almada as an enemy of the government, due to his difference in opinions, and implied that anyone who showed similar attitudes would also be classified as enemy of the state.

Among the supporters of Cárdenas' regime and the oil expropriation, were the public figures: Jose Mancisidor, Manuel Prado, and Rafael Ramos Pedrueza. Jose Mancisidor was a novelist, and editor of the Marxist magazine *Ruta*. Manuel Prado was a composer, and Rafael Ramos Pedrueza was a historian, and former Congress representative. An interview with these figures was published in *Hoy Magazine* on October 7, 1938, in which they gave their opinion about the oil expropriation law. In the interview, they referred to the expropriation as an act of patriotism and a historical prowess. When referring to Cárdenas, they used the strategy of over lexicalisation by using repetitive adjectives in order to increase the impact of

the statement. The speakers also used honorifics, such as referring to Cárdenas as general to represent him as an authority figure. Similarly, the use of hyperboles represented Cárdenas with magnified virtues. For example, when talking about Cárdenas, Jose Mancisidor said:

When the vast majority of state men tremble terrified of violence or become accomplices of the same violence. Mr. General Cárdenas, with a sense of responsibility that ennoble him, speaks as a free man, who wants to govern free people (Editorial, 1938, p. 315)

Mancisidor makes reference to the weakness of previous governments and describes Cárdenas as a noble and responsible person that is fighting for the people. When referring to the oil expropriation, Ramos Pedrueza said: “The oil expropriation constitutes an act of justice, fearless, energetic, and deserves the persistent and indestructible support of the Mexican people” (Editorial, 1938, p. 315). Ramos Pedrueza used over lexicalisation to refer to the oil expropriation. Through the use of deontic modality, he aims to persuade the public that the oil nationalisation was an act of justice that deserved the support of the people. The influence of public figures played an important role in forming the public opinion. The texts of public figures have similar lexical choices as the ones found in Cárdenas’ discourses, particularly the use of structural oppositions to refer to oil companies as rebellious and the enemy of the Mexican people.

The opinions expressed by Mancisidor and Pedrueza show a common reference to terms of justice and bravery. Mancisidor and Pedrueza refer to the president as a hero that accomplished something remarkable. The use of personalisation and honorifics, increases the impact of the discourse, mythicizing Cárdenas as an authority figure that did something that no one else could do. Through the use of deontic modality, Pedrueza tried to persuade the people to support Cárdenas and the expropriation.

The oil expropriation created a great conflict at the international level; the United States, and England were the most affected countries. Holland was also damaged by the oil expropriation, the ambassador of this country established diplomatic communication that was

soon dismissed by the Mexican government. Mahofer (1938), representative of the government of Holland expressed his concern in a series of letters, giving juridical arguments in order to protect the affected companies. The Mexican minister of international affairs Eduardo Hay used a series of lexical strategies in his responses, in order to justify the actions of the government. Hay used structural oppositions, metaphors, over lexicalisation, hyperbole and dynamic modality among others. Hay used a metaphor when referring to the constitution and its recent changes by saying “The constitution is a living being, symbol of the political life of the country and therefore without changing its structure, grows as any other organism” (Hay, 1938, p. 266).

Hay argued that any country that wants to be internationally respected, needs to have great reserves of hydrocarbons. Hay highlighted the role of the nation and furthered the structural oppositions in his argument: “the use of resources has to be made by the nation and it cannot be left to the whim of the companies” (Hay, 1938, p. 266). Hay used hyperbole and dynamic modality to predict future events, when saying that the unjustified defiance of the oil companies would cause great damages to the country unless they were stopped.

The discussion between the English government and the Mexican government regarding the oil expropriation also generated mixed opinions. The unions of lawyers expressed their support to Lázaro Cárdenas in a letter sent to “*El Universal*” a popular Mexican newspaper. The author, Guillermo Schulz, was a lawyer and general secretary of the union of lawyers. Schulz expressed his support to Cárdenas and appealed to the precedent of foreign exploitation, in order to persuade the public opinion of the legitimacy of the expropriation. Schulz argued that any free and sovereign country should reject the intervention of any other government in the domestic affairs.

When referring to the oil companies, Schulz categorize them as: exploitative and imperialists. He argued that the demands of the companies were illegal and that their only

goal was to exploit the natural resources of the nation without benefiting the people. Schulz used structural oppositions and over lexicalisation when referring to the oil expropriation and the international discussion: “In this new stage of the problem created by imperialist companies, we can show our patriotic solidarity, faith and trust towards the president of the republic.” (Schulz, 1938, p.201). Through the use of structural oppositions, Schulz presented the oil companies as responsible of the conflict and justified the expropriation. He also used deontic modality as an imperative to persuade the people to give their support and solidarity to the president Cárdenas.

The elements found in the supporters’ discourse were similar to those of the official discourse, however the representation of the president Cárdenas had a higher use of over lexicalisation and honorifics. The supporters’ discourse represented Cárdenas as an individual that would take actions that no one else could in order to protect the nation, furthering the mythification of his figure.

5.3.3 Opposition discourse

The oil expropriation generated mixed feelings in the nation. People all over the country gave their support to Cárdenas’ policies, however Cárdenas’ regime was also criticised by several groups and institutions. Among his opponents was the former governor of the state of San Luis Potosi, Mateo Hernandez Netro, and the group *Accion Revolucionaria Mexicanista* (ARM). There was a series of publications made criticising Cárdenas’ regime and his policies, signed by figures such as Agustin Aguiar, Luis Cabrera, Joaquin Santaella, and the Institute of Economy and Social Studies.

The lawyer Agustin Aguiar Almada published a series of articles in magazines such as *Hoy* and *El Economista* related to the oil expropriation, which caused an adverse reaction of figures, such as, Antonio Gomez Robledo, as I discussed in the supporters’ discourse.

Aguiar Almada implied that the justice system in Mexico was in the hands of the president and the Judges main goal was to back up the decisions of Cárdenas.

When referring to the oil nationalisation and the policies of Cárdenas' government, the lawyer Luis Cabrera used the lexical strategies of presupposition and metaphor. Cabrera argued that the public speeches and declarations gave false information to the population in order to create a positive atmosphere that would give optimism to the population about the new economic methods of the directed economy. Cabrera argued that this propaganda only covered the failures of the economy in order to keep the population content. He used presupposition, by assuming that the data the government was releasing was false. Cabrera used a metaphor to refer to Mexico as the city of Dr. Ox, from Julio Verne's work. He said, "we are living in an atmosphere of optimist lies that make our nation look like the city of Dr. Ox" (Cabrera, 1940 p. 400).

The Institute of Economic and Social Studies (IESS) published articles questioning the legitimacy of the expropriation. In the article *Significado del Fallo de la Suprema Corte* the institute presented an analysis of the expropriation law. The Institute's position was that the government was trying to justify the expropriation, even if it was against the law. Through the use of presupposition and deontic modality, the IEES, Cabrera and Aguilar Almada, implied that the government was not trustworthy and tried to persuade the population to stop believing in the government (Instituto de Estudios Economicos y Sociales, 1939).

Mateo Hernandez Netro, former governor of the Mexican state of San Luis Potosi, participated in a rebellion against the President Cárdenas in 1938. Hernandez Netro wrote a Manifesto on May 15th, 1938. Hernandez Netro questioned the legitimacy of Cárdenas regime and dissent his government. In his manifesto Hernandez Netro used a series of strategies to persuade the public opinion that Cárdenas' regime was exploiting the nation and

affecting the economy with his communist ideology. The manifesto shows strategies of collectivisation, over lexicalisation, hyperbole, structural oppositions and metaphor (Hernandez, 1938, 985).

The strategy of collectivisation was used when referring to the people of Mexico, using phrases such as *all of us who love Mexico* or *all the men of honour*. The use of collectivisation was also found when the former governor referred to the feelings of the population as there was a generalized civil unrest and the entire country had the same longing. When referring to the Cárdenas' regime and its policies, Hernandez Netro, used hyperbole, dynamic modality and over lexicalisation when saying, "The disaster is fast approaching us, misery, ruin and dishonour hover over Mexico" (Hernandez, 1938, p.985). and considered Cárdenas would lead Mexico to "the biggest ruin and the most terrible misery" (Hernandez, 1938, p.985). Through the use of collectivisation, Hernandez Netro presented the population of Mexico as a nation that had the same dissatisfaction, but must remain united. The use of hyperbole added impact to the discourse by using the terms disaster, misery, ruin and dishonour. Those terms were used to imply the gravity of the situation and persuade the population to take action against the government.

Hernandez Netro accused Cárdenas and his family of corruption and clientelism, given that members of Cárdenas family had important positions in different ministries, which Hernandez Netro labelled as immoral. One of the main reasons for Hernandez Netro to dissent Cárdenas regime was an assumption of Cárdenas mental and material processes, based on his policies, that the president had a communist ideology and was using the nation's resources to sponsor communist pledges at an international level. Hernandez Netro used over lexicalisation to refer to Cárdenas as a "dictator, subordinate of the most bloodthirsty despot of all times: Joseph Stalin" (Hernandez, 1938, p.985). Hernandez Netro manifesto used

deontic modality and over lexicalisation to persuade the population to take action against the government.

The people of Mexico has the imperative need to shake off the oppression of false idols ... with all strength and gallardía follow us, so you will not be responsible in history for the continued support of an individual that corrupts everything, (Hernandez, 1938, p.985).

Through the use of structural oppositions, Hernandez Netro presented Cárdenas as an enemy of the nation. Hernandez Netro implied that Cárdenas policies were going to benefit foreign interests. However, unlike the official discourse, the foreign interests were not represented by the oil companies but by the international communism instead. This assumption presented the *us vs. them* division and the structural opposition towards foreign intervention.

ARM was among the groups that opposed Cárdenas, a nationalist paramilitary group that was against communist ideologies. The ARM was also suspected to have links with the former president Plutarco Elias Calles, who was arrested in 1936 and later exiled under the orders of Cárdenas. The ARM's manifesto, expressed their concern towards Cárdenas' policies, which they referred to as a danger for the nation. In its manifesto, the ARM used dynamic modality and hyperbole to persuade the population that Cárdenas' regime was prejudicial for the nation.

In view of the apparently inevitable disaster and the state of anarchy that the current president Lázaro Cárdenas has plunged the country in ... the disaster of Mexico is imminent, Mexico sinks into the abyss as a result of criminal government that rules it (Accion revolucionaria mexicanista, 1938, p. 971).

When referring to Cárdenas the ARM used metaphors, objectification and over lexicalisation. The ARM had multiple accusations against Cárdenas' government, including clientelism and corruption. For example, the ARM called Cárdenas a "tragic clown that spread terror and desolation in the country" (Accion revolucionaria mexicanista, 1938, p.971). The ARM also accused Cárdenas of "appearing as a puritan, when everyone knew

that him and his siblings controlled all the dealings from the country” (Accion revolucionaria mexicanista, 1938, p.972).

Another accusation of the ARM was that Mexico had a hybrid government that promotes strikes, and simultaneously destroys sources of employment “manifests itself friend of the proletariat and just appears to protect the labourers but forgets and sacrifices the *campesinos* and the soldiers” (Accion revolucionaria mexicanista, 1938, p.972). ARM argued that in Cárdenas’ regime just the leaders became rich when most of the *campesinos* were barefoot and starving. The ARM represented Cárdenas’ policies as a strategy to increase the political power of his party “The ARM accuses Cárdenas of corrupting the military, while aligning them to the ruling party so that they will be controlled by the party leaders” (Accion revolucionaria mexicanista, 1938, p.972). Some of these accusations were also found in other texts such as the Manifesto from the former governor of San Luis Potosi, Mateo Hernandez Netro.

One of the major concerns of the ARM group was that Cárdenas’ policies showed a degree of a communist ideology and suggested that he was following a communist tendency and planned to “convert a national treasure into public welfare for the international communism” (Accion revolucionaria mexicanista, 1938, p.985), by giving the profits of extractivism to communist countries. In the previous statements, we can see that regardless of ideology or domestic conflicts there was a common concern between supporters and opponents of Cárdenas’ government: the intervention of foreign countries to exploit domestic resources.

The ARM used in its manifesto the strategies of collectivisation and deontic modality to represent a common feeling and a common goal of the Mexican people. The ARM used over lexicalisation and personification to give the nation a human characterisation. The first example refers to the goal of ARM to “show the problems and the bad habits that overwhelm

and asphyxiates the national consciousness” (Accion revolucionaria mexicanista, 1938, p.973). When exhorting the population to take action against Cárdenas’ government, the ARM appealed to the people’s “patriotism, braveness and historical manliness, in order to stop the country of being destroyed by the establishment of a sovietised regime that Cárdenas was leading the country to” (Accion revolucionaria mexicanista, 1938, p.973).

Among the texts produced by the ARM was a document exhorting the military to take action against Cárdenas’ government. In this document, we can find similar elements from the previous manifesto, such as over lexicalisation, hyperbole and deontic modality. As the main goal of this text was to persuade the military to take action against Cárdenas’ government, the ARM referred to the military as “the glorious generals and officials that have sacrificed so much, in order to make Mexico such a big country, must fight for their honour against Cárdenas and his subordinates” (Accion revolucionaria mexicanista, 1938, p.974). The ARM said that they had a historic responsibility to protect the country. They argued that Cárdenas was leading the country to a complete misery while governing over the law.

The opposition discourse referred to two main actors, Cárdenas’ government and the nation. The production of the discourse was mainly made by groups such as the ARM that had links with the previous regime, among others. The discourse included use of hyperbole, structural oppositions, over lexicalisation and deontic modality. The message of the discourse intended to persuade the population that the government was not trustworthy and that the actions of Cárdenas would have negative effects in the country. Hence, the population should take action to protect the nation against Cárdenas regime.

In this section I presented an analysis of the discourses found in the corpus. Including the official discourse, the supporters of Cárdenas’ government and the discourse of the opposition. The following section addresses the analysis of the relationship between the discourses, the historical, and the sociopolitical context.

5.4 Critical Analysis

In the previous section I discussed the elements of the official, supporters, and opposition discourses regarding the oil nationalisation. In this section I present the interpretation of the links between: discourses, socio political context, and historical context. I use the elements of critique from the discourse historical approach to reveal the internal structures of the discourse and demythify historical events (Glynos et al, 2009; Forchtner, 2011; Wodak and Meyer, 2009), I guide this critique with a constructivist theoretical framework.

An early precedent of the resource nationalism discourse can be attributed to the social structures of the colonial Nueva España. Wendt's example of the encounter between the Aztecs and the Spaniards in 1519 (Wendt, 1999) illustrates the lack of shared understandings between the two cultures, which created an unequal relation of power. During the colony, European norms and structures were imposed to the native Americans. Alongside with the process of *mestizaje*, the social learning process created new shared understandings in the population of the Nueva España. In a similar manner that other understandings were adopted from the Spanish culture, the relationship between extractivism and sovereignty was learned and adapted from Spanish understandings. The analysis of the debates of the courts of Cadiz, showed a lexical relationship between sovereignty and extractivism. The representatives in Cadiz deemed mining as an activity that contributed to the sovereignty of the nation. People of the Americas were demanding equality of rights and representation, this shows the discontent of the people with previous norms, which is a key element in the development of sovereignty (Wendt, 1992), consequentially increasing the importance of extractivism in the fight for sovereignty. Extractive industries symbolised the right to be

recognized and emancipated them from foreign exploitation. The discontent of the people culminated in the independence war of 1810, nevertheless the shared understanding of the relationship between sovereignty and the extractive industries prevailed in the Mexican society.

After the independence war, Mexico was in a constant state of conflict as several factions tried to stabilize and legitimise their governments. The loss of almost half of the Mexican territory in 1846 furthered the antagonism towards foreign powers. During the presidential term of Porfirio Díaz there was growth and stability, foreign capitals were flowing into the country but there was a persistent inequality. These circumstances sparked the revolution of 1910, where several revolts around the country led to conflicts and betrayals that left the country weak and divided.

The post-revolutionary atmosphere was characterised by the efforts to stabilize and unite the country. President Calles established a regime that would last for several decades. However, when Cárdenas became president, his ideological differences with Calles led him to develop a strategy that would legitimise his own version of the political regime. The concept norm entrepreneur, as defined by Finnemore and Sikkink (2001), refers to individuals who influence change in social structures. I argue that Lázaro Cárdenas played this role by using his agency to legitimise his regime and institutionalise resource nationalism. The reforms made in Cárdenas' government culminated with the gratitude of *campesinos*, dependency of the working class and an education system that would reproduce the official discourses. Cárdenas founded a political system with the capabilities to reconstruct the ideals of the ruling party in diverse sectors of society, making the system essentially self-perpetuating. Cárdenas appealed to the collective memory and furthered the antagonism towards the foreign, in order to unite the nation with a common goal. This goal was to claim justice for the nation, after the precedents of foreign exploitation.

The oil nationalisation of 1938 was the cornerstone in the legitimisation of Cárdenas and the ruling party. Wendt (2003) argue that a society perceive a state as having rightfully use of force to pursue people's interests if the state has cohesive power, legitimacy, sovereignty, and corporate structure. Given that there were still rebellions in the divided Mexican society, such as the cases of the governor of San Luis Potosi and the ARM, Cárdenas' government needed to consolidate its legitimacy. Cárdenas aimed to legitimise his regime by claiming to pursue the people's interests and demonstrating a *rightful* use of force through the oil nationalisation. This event became a political institution that still influences energy policy to this day (Spenser and Levison, 1999). The oil expropriation became a symbol of nationalism in Mexico. Modern history presents the oil nationalisation of 1938 as an act of valour against foreign exploitation (Bethell, 1991). The opposition discourse became obscured, several groups expressed their concern over the way Cárdenas was leading the nation. Nevertheless, the narrative of this discourse is not mentioned in the official history and the figure of Lázaro Cárdenas prevails as a hero from the nation, who was admired and cherished by the people.

The official discourse has been constructed and reconstructed throughout the years, however not all element remains the same, as I discuss in the following chapters. The original discourse was promoted by Cárdenas himself and supported by government officials and public figures. The use of structural oppositions is the core of the discourse, Lázaro Cárdenas and his supporters, established an antagonism between the foreign oil companies and the nation. The choice to pursue this antagonism can be related to the precedent of colonial exploitation in the collective memory. Cárdenas argued, "It is the very sovereignty of the nation, which is exposed to simple manoeuvres of foreign capital" (Cárdenas, 1938). In his statement, there is a distinct similarity to the lexical choices in the courts of Cadiz. Both discourses relate extractivism with sovereignty. Cárdenas discourse aimed to unite the nation

with a common goal to fight for justice. Cárdenas presented himself as a leader who would deliver justice, consequentially gaining the support of the people. Adler (1997) argues that the process of institutionalisation occurs when norms gain legitimacy by becoming part of the natural order. By claiming that the oil nationalisation was a fight against foreign exploitation, Cárdenas legitimised the oil nationalisation and institutionalised resource nationalism.

The support of the people was key to legitimise the power of Cárdenas' political regime. By focusing his agenda on one specific issue with a significant meaning to the people, Cárdenas ensured their support. While there were many issues to deal at the time, the protection of a natural resource was an issue that conjoined the elements that helped persuade the public opinion to support the president. A recurrent issue in Mexican history is exploitation, from colonial Nueva España, to the loss of almost half of the Mexican territory in Santa Anna's government (Bethell, 2001). Foreign exploitation was linked to the use of natural resources to benefit a foreign country. In colonial times, minerals such as gold and silver, were used to increase the power of the Spanish kingdom, while the people in Mexico were in precarious conditions and often abused by the Spaniards.

The historical precedent linking exploitation and natural resources illustrates why the people would be compelled to support an antagonism between foreign oil companies and the Mexican nation. The link formed between the idea of foreign interests and exploitation, was used as a key element of the official discourse. While the positive economic impact of foreign oil companies in Mexico was dismissed in the official discourse, the problems with the work conditions and potential strike was a perfect instrument to use as a flag for legitimisation of the presidential power. The strategy of president Cárdenas was to persuade the public of the importance of taking control of the oil industry.

The resource nationalism discourse was constructed with a combination of the official discourse and the supporters discourse. The discourse created by the supporters of Cárdenas

was an interpretation of the official discourse and their perception from the main actor, president Lázaro Cárdenas. The supporters' discourse contributed to mythicize Cárdenas and represented him as a hero and protector of the nation. The supporters of the oil nationalisation often used over lexicalisation when referring to Cárdenas in order to stress his virtues by linking his name with words such as *fearless* and *noble*. The diffusion of this image to the public was a crucial factor in the later construction of the image of Lázaro Cárdenas as a national hero.

The intellectual debate regarding the oil nationalisation was disseminated through articles in magazines and newspapers, where people from different backgrounds expressed their support to oil nationalisation, and Cárdenas' policies. The oil nationalisation debate also generated a discourse from several groups that opposed the oil nationalisation and Cárdenas' regime. However, this discourse was obscured and it was not reconstructed throughout the years. Nonetheless, the opposition discourse presents a similar element found in the official discourse: a structural opposition with the foreign.

The opposition discourse expressed their concern that the Soviet Union and other communist countries would intervene in domestic policies. The group ARM believed that through the oil nationalisation, Lázaro Cárdenas would use the profits from the oil industry to support international communism. The opposition discourse referred to the oil industry as a *national treasure* which should be protected. This shows that regardless of the political ideology, there is a common ground on the protection of natural resources from foreign exploitation.

In summary, I argued that the historical resource nationalism discourse was constructed as a means to legitimise the power of the political regime lead by Cárdenas, and it was perpetuated by his supporters. I argue that the legitimisation was a premeditated strategy, given the political choices of Cárdenas. He created a dependency of labour unions to

the ruling party, while undermining any possible future opposition of independent unions. He gained gratitude and loyal followers with the agrarian reform, and he created the means to reproduce the official discourse through the education system.

The original resource nationalism discourse was constructed as a strategy to gain the support of the people. The main goal of this strategy was to unite the people in a shared idea of a nation, hence the use of adjectives, over lexicalisation and hyperboles in the official discourse. These strategies were used to emphasize and add impact to the idea of the nation. A shared specific goal would motivate the people to support the president. The oil nationalisation was a specific goal with a historical precedent, and an antagonist figure. These elements motivated the people to support the president and legitimise his power and the power of the ruling party. In this legitimation strategy, it was important to present a structural opposition in the discourse.

Foreign oil companies presented a viable antagonist figure to defeat. Given the general unrest of the workers in the oil industry, the situation presented an opportunity for the government to intervene and gain a symbol for the people to fight for. The symbol from the discourse needed to be appealing for the people, something that they could relate to and would be willing to fight for. Oil as a natural resource in the control of companies from foreign countries was a resemblance of the colonial exploitation from Spain. The oil nationalisation would represent a symbol to break the chains of exploitations from foreign countries and taking control of a *treasure* that belongs to the nation.

The original resource nationalism discourse was constructed with a goal to unite the people as a nation. It was a symbol that represented the recognition and self-determination of Mexico, and a new beginning that breaks with the historical precedents of foreign exploitation. Resource nationalism became institutionalised through the oil nationalisation, and the state control over the energy sources. Checkel (1999) argues that institutionalisation

happens when consistent norms are included in laws and codes. This was the case of the oil nationalisation, which became institutionalised and constructed the resource nationalism discourse that still influences energy policy.

Conclusions

In this chapter I presented an analysis of the historical construction of resource nationalism. With the use of the discourse historical approach of critical discourse analysis and a constructivist theoretical framework I provided my interpretative answer to the research question: How was resource nationalism in Mexico constructed and institutionalised? I analysed the colonial precedents of the resource nationalism discourse, and found an association between extractivism and the understanding of sovereignty in the courts of Cadiz. Given that these understandings were closely linked to the battle for representation of the people from the Americas, it established a precedent for the resource nationalism discourse. I continued with a discussion of the post-independence context, the Mexican revolution of 1910 and the governments that preceded Lázaro Cárdenas' presidency. In the sociopolitical context, I explored the reforms conducted in Cárdenas term and the events linked to the legitimisation of his political regime. I continued with the analysis of the discourses surrounding the oil nationalisation, which I divided into official, supporters and opposition discourses.

In this analysis, I argued that oil nationalisation was the culmination of a legitimisation strategy developed by the president Lázaro Cárdenas. The legitimised regime was founded on the ideals of the Mexican revolution of 1910. The precedents of exploitation in the collective memory made the oil nationalisation a symbolic victory against foreign exploitation. The reforms implemented by Cárdenas enabled him to reach diverse sectors of the population and

secure their loyalty. Firstly, the agrarian reform, provided him with the gratitude of *campesinos* and furthered their antagonism towards private landlords, creating an *us vs. them* division. Secondly, the alignment of the CTM to the ruling party provided him with the loyalty of the working class and created a dependency between the unions and the state. Similarly, the alignment of the education workers and the socialist education, enabled him to reproduce the official discourse to the generations of students to come. As a result, Cárdenas institutionalised a new political regime that lasted several decades.

In the following chapter I provide my interpretation of the resource nationalism discourse in the presidential terms of Ernesto Zedillo and Vicente Fox. I explore the mythification of the oil nationalisation, and themes of sovereignty, social justice and oil dependency.

Chapter 6. Resource Nationalism Discourse and Environmental Representation from 1994 to 2006

In the previous chapter I presented the historical construction of resource nationalism in Mexico. I explored the origins and lexical elements of the discourse, and the sociopolitical context. In this chapter I explore the modern reconstruction of the resource nationalism discourse from 1994 to 2006. For this analysis, I divide the chapter into two sections. I begin with the administration of Ernesto Zedillo from 1994 to 2000, followed by the presidential term of Vicente Fox from 2000 to 2006. For each presidential term, I present the sociopolitical context, followed by the corpus analysis, and I finalise with a critical analysis.

The material of the corpus consisted on the debates diaries from the Congress during the LVI, LVII, LVIII, and LIX legislatures. The relevance of the texts was determined by the discussions on oil, energy policy, and aspects related to resource nationalism. The corpus analysis is divided into four themes found in the discourse. Firstly, I explore the mythification of the past, including the figure of Lázaro Cárdenas and the oil nationalisation. Secondly, I discuss sovereignty, and foreign intervention. Thirdly, I discuss oil dependency, privatisation, and social justice. Finally, I conclude with the environmental aspects of the discourse and the representation of climate change. In the following section I begin with the analysis of the administration of Ernesto Zedillo.

6.1 Presidential term of Ernesto Zedillo: 1994 – 2000

The administration of Ernesto Zedillo was important in terms of being the last continuous administration of the Institutional Revolutionary Party (PRI), after more than

seventy years of uninterrupted rule. According to Hernandez, (2003) the importance of this administration is that it was the last of the PRI's continuous political regime and achieved a transition to democracy without destabilising the country. Zedillo's administration changed the previous controlled policies of the PRI. However, the circumstances where Zedillo was selected candidate were different than the previous administrations. In the following section I discuss the sociopolitical context of the Administration of Ernesto Zedillo.

6.1.1 Sociopolitical context

In March 1994, Luis Donaldo Colosio the PRI's candidate for the presidency was assassinated in Tijuana, Baja California. This assassination changed the roles of many politicians and the atmosphere for the presidential elections in the country. This tragic event brought Dr. Ernesto Zedillo to the presidency of the nation. Zedillo was former Secretary of State under the preceding presidency of Carlos Salinas, and was the former coordinator of the presidential campaign of Colosio (Romero, 2012). Zedillo was the first candidate to come to power with less than fifty percent of the votes, a taboo figure for PRI's hegemony. Furthermore, he was the last of fifteen consecutive presidential terms of the post-revolutionary regime (Valentine, 2012). After an appalling start of the administration, Zedillo was challenged by the influence in politics that remained from the Salinas administration (Hernandez, 2003).

At the beginning of Zedillo's term, the major issue was coming straight into a financial crisis, which reduced the prospects for growth of the Mexican economy (Zimmermann and Conger, 1995). The Mexican financial crisis of 1994-1995, also known as the *tequila crisis*, started after Mexico's currency devaluation in December 1994. This event precipitated a banking crisis from 1995 to 1997, the largest depreciation of the Mexican peso in one year. The currency went from 5.3 pesos per dollar to over 10 pesos per dollar, between

December 1994 and November 1995, it was the most severe recession in over a decade. Due to the large-scale reform and deregulation of Mexico's economy during the second half of the 1980s. The aftermath of the recession and the banking crisis of 1995 was not as severe as expected and the country developed a more stable economy. In the following fifteen years there were no financial or exchange rate crises that were produced by the mismanagement of Mexico's economy (Musacchio, 2012).

Contributing to the turbulent start of Zedillo's administration, was the armed uprising of thousands of indigenous people in Chiapas. The group was named *Ejercito Zapatista de Liberacion Nacional* (EZLN). Harvey (1995) argues that on January 1st, 1994, everyone was surprised by the scale and sophistication of the rebellion, which seemed to have been organized over several years. The tactics of the EZLN were different from other *guerrilla* movements in Mexico and Latin America. Khasnabish (2010) refers to *Zapatismo* as a political philosophy and practice developed from "the confluence of urban guerrillas seeking favourable ground for revolutionary organizing, migrant indigenous communities practicing a new kind of politics, and a socio-economic and political context marked by extreme violence, exploitation, and repression" (p. 73).

The transition to the free market in rural Mexico was governed by macroeconomic decision-making, which according to Harvey (1995) was detached from the realities of *campesinos*. The new agrarian law generated concern about the *ejido* reform. *Campesinos* feared that the sale of *ejido* plots could lead to a redistribution of land that would benefit *terratenientes* who owned several plots of land. The practices conducted by the EZLN included a process for discussing issues of collective concern. Citizens casted ballots after talking with Zapatista delegates about their struggles and learning about issues beyond their localities (Swords, 2007).

Volunteers and Zapatista delegates learned to listen to the concerns of the people and educate them about broader issues. This process strengthened the legitimacy and capacity of the independent organisations. Starr, Martinez and Rosset, (2010) argue that since the emergence of the guerrilla army in January 1994, the Zapatistas worked to develop autonomy as a response and an alternative to the globalisation process. When the Mexican government overlooked the 1996 San Andrés Agreement, which granted limited autonomy to indigenous regions of Mexico, the Zapatistas decided to construct political autonomy unilaterally.

The NAFTA treaty played an important role during Zedillo's administration. The treaty represented a more open economy and a change to the way politics worked. As we have seen, groups like EZLN felt threatened by the economic path of Mexico. Despite the initial criticism against the NAFTA treaty, it proved to be a tool to promote democracy and reduce authoritarianism. An example of this was the change in the way the government reacted to the Zapatista insurrection, which in earlier decades could have been managed by authoritarian measures (Alba, 2003). Citizens experienced a new empowerment, they could vote without fear to reflect their interests as members of an increasingly complex and diverse society (Valenzuela and Bailey, 1997).

The state of Tabasco had elections for governor in 1994. Roberto Madrazo, from the PRI, was elected, and Andres Manuel Lopez Obrador from the PRD was in second place. However, Lopez Obrador did not accept the results, claimed electoral fraud, and organized a protest march to the capital of Mexico. As part of his mobilisations, Lopez Obrador participated in the occupation and burning of oil wells in Tabasco state. This issue was discussed in the Congress given the violence of the protests and the losses for PEMEX of 63 million pesos (Camara de Senadores, 1994; Romero 2004). In 2006, Madrazo and Lopez Obrador contended for the presidency of Mexico. Lopez Obrador lost the election, claimed electoral fraud and declared himself *legitimate president*. I explore this topic further in the

next chapter. In the following section I explore the modern resource nationalism discuss and provide an analysis of the corpus from legislatures LVI and LVII of the Congress.

6.1.2 Corpus Analysis

In this section I present the interpretation of the lexical and intertextual analysis. The corpus for this analysis includes the diaries of Congress debates from the legislatures LVI and LVII, which cover the years 1994 until the year 2000. I analysed the diaries that were relevant to resource nationalism including oil and energy policy. I identified four themes relevant to the resource nationalism discourse, which include mythification of the past, sovereignty, oil dependency and environmental representation. I begin the discussion with the mythification of the past, which explores the perceptions of the representatives regarding the presidency of Lázaro Cárdenas and the oil nationalisation.

6.1.2.1 Mythification of the historical resource nationalism

The oil nationalisation of 1938 and the legacy of Cárdenas is a salient element in the corpus of the Congress debates. The analysis of the corpus showed a mythification on these elements of the discourse. Members of all parliamentary factions showed a strong sense of reverence and admiration of Cárdenas, and the oil nationalisation regardless of their disagreements in the debates. This was particularly distinctive in the speeches from representatives of the Democratic Revolution Party (PRD) and the Labour Party (PT), who presented the figure of Cárdenas in an idealised manner. Cárdenas was generally represented with adjectives such as a brave, humble, hero, and virtuous man, while giving little nuance to his character.

Cárdenas is a figure that is present in several discourses. He is an important figure in the agriculture and education debates but the most salient references of Cárdenas, and the oil

nationalisation are present in debates regarding the energy sector. The debate from October 29th, 1996 illustrates the mythification of Cárdenas and the oil nationalisation. The debate proposed to reform article 27 of the constitution, which declares all land and water within the country's territory property of the nation. From this article emanates the legislation on the nation's ownership of oil.

During a debate on petro-chemistry, the industry of processing and refining oil, the senator Layda Sansores from the PRI stated that when Cárdenas decided to nationalise the oil industry in 1938 he "met with his cabinet and warned them about the risks; he knew he was gambling his administration and even his life" (Camara de Senadores, 1996, p. 185). Sansores represented Cárdenas as: "a man of bravery, conviction, and courage. He risked everything for Mexico. Cárdenas did not bow to foreign pressure" (Camara de Senadores, 1996, p. 185). Sansores attributes Cárdenas several virtues, particularly bravery. She establishes a presupposition that the foreign pressure due to the oil nationalisation was life threatening. However, she conceals who was exercising the pressure or how was the situation life threatening. When the senator says Cárdenas *did not bow to foreign pressure*, she is establishing a presupposition that any other person would have bowed to foreign pressure. Hence, the senator differentiates Cárdenas from the rest of the people, making his behaviour more valuable.

The idealisation of Cárdenas can further be illustrated by the representation of his mental processes. Senator Heberto Castillo from the PRD classify Cárdenas' ideas as having unquestionable veracity: "It is impossible that Cárdenas' ideas are good in abstraction and bad in reality, they cannot be only good for the oil nationalisation and bad for the modernisation of the oil industry" (Camara de Senadores, 1994a, p72). Senator Flores, represent Cárdenas' ideals as: "the response to the need of social justice and... the defense of national sovereignty" (Camara de Senadores, 1995c, p. 18). The previous statement attributes a moral

superiority to Cárdenas intentions. Flores established a presupposition that the intentions behind Cárdenas actions were based in the collective welfare rather than being motivated by self-interests. Similarly, Senator Tinajero Escobedo aims to justify Cárdenas' moral superiority by stating that when Cárdenas was alive he asked, "to be paid tribute only through hard work" (Camara de Senadores, 1995c, p. 8). Tinajero focuses on the selflessness of asking only for hard work. Nevertheless, he overlooks the fact that asking to be paid tribute shows that Cárdenas thought of himself as someone who deserved to be honoured. Hence, it conflict with the discursive representation of Cárdenas as a humble hero.

Alongside the idealized image of Cárdenas, the corpus showed salience regarding the significance of Cárdenas heritage in the collective memory. Senator Salgado refers to Cárdenas' legacy as the "contemporary values represented in the historic and collective memory of our people" (Camara de Senadores, 1995c, p. 19). He argued that "when sovereignty is compromised... it is necessary to go back to the historical memory to claim back the nationalism and strategic vision form Cárdenas' government" (Camara de Senadores, 1995c, p. 19). Moreover, senator Serrano refers to the role of the education system in the reproduction of Cárdenas' official discourse: "we are taught since primary school to be proud of the oil nationalisation" (Camara de Senadores, 1996, p. 74). With these statements, the senators acknowledge that the oil nationalisation has been institutionalised through the education system and it is now part of the collective memory. Feeling proud of the oil nationalisation is a learned norm, transmitted through the education system. Hence, the understanding and reproduction of this norm has become a construct in the collective identity.

6.1.2.2 Sovereignty, state ownership, and foreign intervention

The core of the resource nationalism discourse is rooted in the concept of sovereignty and the rejection of foreign intervention. The term sovereignty is used regularly in the resource nationalism discourse. However, this term is often used ambiguously as a means to add impact to the discourse, rather than as a specific concept. The understanding of sovereignty in the Congress is often defined through structural oppositions, particularly with the domestic and foreign private sectors. Sovereignty is used to justify state ownership, and reject participation of the domestic private sector in the energy industry. The lack of consistency in the understanding of sovereignty in the Congress is illustrated by the statement of senator Heberto Castillo:

Cárdenas went as far as to impose expropriation on transnational corporations as a means to defend sovereignty. Nowadays, we have left behind the fundamental concept of national sovereignty, under the pretext of the need to integrate Mexico in the era of globalisation of the economy. People say that the concept of national sovereignty has changed. They stigmatize us, who the old fashion way, believe that the natural resources should benefit the people of Mexico, they tell us that we are historically out-dated (Camara de Senadores, 1994b, pp. 29).

Castillo, talks about a fundamental concept of sovereignty, and establishes that the natural resources should benefit the people of Mexico. Castillo denotes a relationship between the oil nationalisation and the defence of sovereignty. Assuming that defending sovereignty means a fight against foreign intervention, Castillo rejects foreign participation in the energy sector. However, if sovereignty means that the natural resources should benefit the people of Mexico, Castillo's statement does not explain the exclusion of the domestic private sector.

Senator Salgado referred to the nature of sovereignty and argued, "it is in the people, where sovereignty resides, as Lázaro Cárdenas very well knew" (Camara de Senadores, 1995d, p. 59). Therefore, if sovereignty resides in the people but the involvement of the private sector would hurt the sovereignty, then it is not the sovereignty of the nation that

would be affected; it is the decision-making capabilities of the state obtained through state ownership. The speech by senator Héctor Sánchez López, gives further clarity in the understanding of sovereignty and its relationship with natural resources:

The sovereignty of a State lies in its decision-making capacity, which is strengthened to the extent that decisions can be made with a lower degree of foreign pressure or foreign influences. Likewise, the ruling action of the State, must have the purpose of strengthening national sovereignty, which will be updated with measures that ensure the use by Mexicans of their own natural resources. And in general, any measure that ensures that the decisions, which affect the people of Mexico, are taken with the least possible amount of foreign interference (Camara de Senadores, 1995b, pp. 68-69).

The speech of senator Sanchez, similarly uses a structural opposition regarding foreign interference. Sanchez goes further in the justification of state ownership. Sanchez establishes a relationship between the decision-making capacity and the ruling action of the state. In this relationship, the decisions regarding natural resources affect the people of Mexico, therefore the decisions should be taken by the state.

During a debate on petro-chemistry, senator Castillo Martinez established a relational process between privatisation and sovereignty. Castillo stated, “the petro-chemical industry... once privatized would be in hands of big transnational businesses, why privatize and expose ourselves to be manipulated from the outside?” (Camara de Senadores, 1996, p. 160). Castillo uses a presupposition to assume transnational businesses are manipulative. He also conceals who would be the injured party in the manipulation. Castillo does not specify if it is the State, PEMEX or the nation, he also fails to specify how the manipulation would occur. Castillo argues that this proposal would “hurt the national sovereignty” (Camara de Senadores, 1996, p160). The statements represent an antagonism with the private sector by establishing a relationship with foreign companies. The discussion over the domestic participation in the oil industry sets a presupposition of complicity between domestic and foreign companies to intervene in domestic affairs.

Sovereignty is used as a core value in the resource nationalism discourse. Representatives use this concept in structural oppositions with the private sector, both foreign and domestic. The understanding of sovereignty in the Congress indicates a close link with state ownership.

6.1.2.3 Oil dependency, privatisation and social justice

The representation of social justice in the resource nationalism discourse portrays social justice as the primary objective of the state. State ownership is perceived as the means to achieve this goal. Therefore, privatisation represents an obstacle in the decision-making capabilities of the state. The discursive premise that oil income should be used to achieve social justice has contributed to the perpetuation of oil dependency.

The understanding of social justice is related to the welfare of the citizens. Natural resources are a key element to fulfil the needs of the population. Hence, they are used to benefit the people of Mexico. The minister of energy talked to the Congress about the electricity sector. In his speech, the minister indicates the role of energy prices as part of the welfare of the citizens. This premise justifies the use of subsidies as a means to pursue social justice:

The ultimate goal of the State is to seek the welfare of citizens, of their nationals, and this is not necessarily achieved only by having ownership of the means of production, but assuring that the those means of production provide the society with the quantity, the quality, and the prices, that are required. (Camara de Senadores, 1999a, p. 67).

The use of the energy sector as a means to achieve social justice is further portrayed by the dependency of social programs on the income from the oil industry. Given the dependency of the state on taxation of PEMEX, social programs are therefore dependant on the state's company. This can be illustrated in the discussion about the government's expenses budget: "It is important to underline that the spending adjustments protected as much as possible the goals of the social programs... The magnitude of the effort is more

valuable considering that this figure incorporates the reduction of oil revenues” (Camara de Senadores, 1998a, p. 28)

Oil dependency is often recalled on debates regarding the energy sector: “PEMEX has paid taxes for the equivalent of almost 90 percent of their operating profits... The process of looting PEMEX makes it seem as if we do not have enough resources for reinvestment” (Camara de Senadores, 1996, p. 159). The statement refers to a *process of looting* of the state company, through heavy taxation. Additionally, “Economic modernization is supported by feet of mud... our country is bananas; we are a country that depends... on a natural product whose prices we cannot affect, as a basis for the fiscal sustainability of the State” (Camara de Senadores, 1998b, pp. 76-77). The previous statements indicate awareness from the representatives, that the oil dependency has been perpetuated through a process of over exploitation conducted by the state. Furthermore, it recalls the lack of control over oil prices, which makes the fiscal model unsustainable. Representatives of the Congress recognized the dangers of the oil dependency and the need to change the fiscal structure. Senator Garavito argued in favour of a fiscal reform to diminish “the risky dependency on oil income” (Camara de Senadores, 1999b, p. 188). However, when reforms to the energy sector are proposed, the discourse becomes highly nationalist and stigmatizes the private sector.

The Congress represents privatisation and the private sector as the antagonist of the nation. Representatives of the Congress establish the presupposition that private interests are against social justice. In reference to a debate on petro-chemistry senator Castillo argues that privatisation perpetuates the prevalence of “petty and irrational private interests” (Camara de Senadores, 1996, p158). The use of these adjectives creates a structural opposition with private interests.

The scope of state ownership is a conflictive issue in the resource nationalism discourse. When discussing the transport, storage and distribution of gas, senator Rocha Díaz

from the PRI argued that those aspects of the industry “were never a matter of concern for president Cárdenas... therefore, is not against his nationalist policies... and historical decisions cannot be invoked to reject this reform” (Camara de Senadores, 1996, pp 79-80). Senator Rocha continues to affirm that legally, the domestic private sector has always been allowed to participate in these activities. This statement reduces the scope of state ownership and argues in favour of inclusion of the private sector. However, the statement is anchored in the legitimacy of historical decisions regarding state ownership.

The Congress understands social justice as the main goal of state ownership in the energy sector. The shared understanding that natural resources should benefit the people has contributed to oil dependency and unsustainability of the sector. This has been a consequence of heavy taxation, and the use of subsidies among others. The private sector has become stigmatized in the resource nationalism discourse and its participation in the energy sector is perceived as an equivalent for foreign intervention.

6.1.2.4 Climate change and environmental representation

The debates from the LVI and LVII legislatures represented the responsibility of the energy sector in environmental matters. These representations were more salient during incidents directly linked to PEMEX or the federal commission of electricity (CFE). Climate change was portrayed as a matter of foreign policy and education, rather than an issue that needs to be address by the energy sector. The representation of climate change was characterised by the use of technical words and statistics. The discourse emphasises the need to comply with foreign agreements and participation in the international community. However, there was an absence in the discussion of specific links with domestic policy. The specific effects of climate change were often represented in a technical form or in a generalised manner.

The absence of discussion of climate change was pointed out by the green party in the annual governmental review, which discusses the impact on “the conservation of about 40% of the biodiversity... the social stability of the inhabitants... and the consequences that the imbalance of the ecosystems would have at a global level.” (Camara de Diputados, 1999, p. 46). However, the discourse does not discuss the role of the energy sector and fails to acknowledge the responsibility that PEMEX and the CFE have in reducing greenhouse gas emissions.

The discussion of climate change during a foreign policy debate, describes it as “a problem that escapes our hands due to its scope... Some consider that is not as important as immediate and local demands such as, salary, housing, and social welfare” (Camara de Diputados, 1997, p. 27). This statement exemplifies the approach to discuss climate change, which addresses the urgency of the matter but does not provide specificity on the measures that need to be taken, particularly by the energy sector.

The discussion points out an unfairness of international agreements, regarding developed countries producing more greenhouse gases than developing countries, therefore developing countries have less historical responsibility: “industrialized countries are pushing for the international community to accept these types of agreements of joint implementation” (Camara de Diputados, 1997, p. 28). The speech, similarly to the resource nationalism discourse, shows the prevailing opposition towards foreign intervention. Given that climate change policy derives from international agreements, there is a reluctance to adapt norms that contravene domestic policy. Particularly norms that contravene the principles of social justice that the energy sector provides.

Climate change, alongside being represented as a foreign affair in the Congress, is represented as an issue that can be solved through the education system: “We are all aware of the recent effects of climate change on the planet... we intend to provide a comprehensive

educational system that will make the students aware of the existence of this condition in the planet, and their responsibility towards it” (Camara de Diputados, 1998b, p. 56). While education is important, this representation conceals the responsibility of the state and shifts the responsibility towards the individuals: “It is urgent to find the mechanisms for the educational system... to make the most of the Mexican people aware of the serious consequences of climate change as quickly as possible” (Camara de Diputados, 1998, p. 46).

The acknowledgment of responsibility from the energy sector in specific environmental incidents differs from the representation of responsibility over climate change. However, the lexical differences can illustrate how climate change can be represented. Deputy Sanchez Hernandez, discusses the contamination of the state of Guerrero, caused by a CFE thermoelectric plant:

Petacalco did not know the poverty levels that they suffer today. Until four years ago their areas of cultivation of mango, papaya, tomato, chilli and watermelon, as well as, river fishing that they have done for generations, was enough to have a life without hardship... Now, Petacalco suffers environmental pollution rates of the same magnitude as those observed in Mexico City, only more harmful for both flora and fauna, and for the health of those who live within a radius of 30 kilometers (Camara de Diputados, 1996, pp. 28-30)

In this example, there is a narrative that tells the story of the people living in the area of Petacalco. It is specific and appeals to familiar things, such as food and fishing. The narrative creates impact by referring to activities that have been done for generations, which establishes a legitimate right to continue cultivating and fishing. The narrative creates a structural opposition with the thermoelectric plant, which is producing the contamination that is stopping the people from their rightful activities. This is a statement that is aiming to influence the behaviour of the representatives and urge them to take measures to protect the people of Petacalco. The difference between the climate change discourse and the Petacalco narrative can be attributed to the differences in scope of the problem. Nevertheless, the

discursive strategies used to influence behaviour regarding the Petacalco narrative can be applied to the climate change discourse.

The discourse on climate change is focused in foreign affairs and education. The speeches conceal the responsibility of the energy sector through the use of technical lexicon. The discourse has salient terms such as *fossil fuels*, but there is an avoidance of the term *oil*. Given that the term oil is closely related to nationalism, fossil fuels create a distance between the energy sector and climate change. Similarly, there is an absence on the discussion of subsidies. Energy subsidies promote the use of fossil fuels, which consequentially contribute to climate change. Subsidies in fossil fuels are closely aligned to the objective of social justice and the shared understanding that natural resources should be used for the benefit of the people. Therefore, this relationship creates a conflict between resource nationalism and climate change mitigation. In the following section I provide my critical analysis of the resource nationalism discourse from 1994 to 2000.

6.1.3 Critical Analysis

In this critique, I explore, with a constructivist lens, the structure of the resource nationalism discourse and map its relationship with the historical and sociopolitical context. I include a prospective critique with the elements that can be applied to improve the climate change discourse. The discourse analysis from the presidential term 1994-2000 showed that the historical heritage of the energy discourse has a great impact in certain factions of the Congress. Foreign companies are still seen as enemies of the nation. However, the discourse shifted the structural opposition towards the domestic private sector. In 1938 the discourse represented a symbolic fight against foreign companies in order to obtain the control of the energy resources. Sixty years later, foreign companies did not represent an immediate threat for the control of the natural resources. Hence, the factions of the Congress shifted the

structural opposition towards the private sector, which is represented as an enemy of the nation. The private sector is perceived as a threat because the government could reduce the decision-making capabilities derived from state ownership. Therefore, the primary objective of social justice would not be accomplished.

The different factions of the Congress showed a spectrum of levels of engagement with the resource nationalism discourse. The parliamentary factions of the PRD and the PT showed the strongest engagement with the discourse. On the other side of the spectrum, the PAN showed the less engagement. Nevertheless, the acknowledgement on the significance of the historical background in the energy sector was similar across parties.

The mythification of historical resource nationalism shows that references to the historical events of the energy sector have a great symbolic importance. As Reus-Smith (2008) states, in order to understand how social structures are constructed, we need to understand their history. In chapter five I analysed the historical construction of resource nationalism and argued that the oil nationalisation was part of a strategy to legitimate Cárdenas' regime, however in the contemporary resource nationalism discourse Cárdenas and the oil nationalisation were represented in a mythicised manner. President Cárdenas is represented with honorifics and over lexicalisation, with adjectives such as heroic, noble, and brave. This representation contributes to the legitimacy of historical decisions, such as the oil nationalisation. The oil nationalisation is presented as the most important event in the energy sector; it provides legitimacy for state ownership and represents PEMEX as the legacy from of Cárdenas. The mythification of the historical resource nationalism was stable over time and became an institutional fact (Klotz and Lynch, 2007)

Hopf (1998) argues that an individual's recognition and response of an identity is produced by their understanding of norms in the intersubjective context. Hence The resource nationalist behaviour of the representatives is a reflection of the understandings that have

been perpetuated throughout time. The term sovereignty is often used in the resource nationalism discourse. However, the Congress' understanding of sovereignty is not uniform. This term is often associated with the protection of the nation, by establishing structural oppositions with the domestic and foreign private sectors. This relationship creates an *us vs. them* division, which places the domestic private sector as if it were not part of the nation. The underlying understanding of sovereignty relies the decision-making capabilities of the state, which are perceived as if they can only be attained through state ownership.

The elements of the discourse are closely intertwined. The discourse is composed by the mythification of the historical elements, the link between sovereignty and state ownership, and the goal of social justice. The representation of the actors is a fundamental element to define the understanding of the discourse. Foreign companies and the domestic private sector are represented as the structural opposition of the nation. The nation on the other hand was used as a synonym for the people. However, the underlying meaning of the discourse shows that the private sector is a perceived threat that could reduce the control over the energy sector.

Participation of the private sector would be problematic for the Congress for two inseparable reasons, an economic and an ideational: oil dependency, and the historical legitimacy of state ownership. These understandings are closely related; the historical heritage of state ownership constructed the objective of social justice. Oil revenues were used to achieve this goal, which simultaneously created an oil dependency from the government to function properly. Oil dependency was perpetuated by the belief that natural resources should be used to benefit the people and the perception that this goal can only be achieved through state ownership. The perceived unquestionable veracity of the historical decisions creates a vicious cycle that limits the possibilities of reducing oil dependency and developing a sustainable energy sector.

The debates on the energy sector showed an absence of climate change representation. Weldes (1998) argues that in the construction of policy, the language of policy makers does not accurately represent reality, instead it represents a classification of the problems to tackle. Climate change was understood in the Congress as an issue of foreign affairs, and education. References to climate change were related to the Kyoto protocol, international agreements, and compliance with international law. The lexical choices in speeches of climate change were often technical and generalised, while avoiding terms such as oil and petrol. This creates a disengagement from the state and the energy sector on climate change matters. Similarly, the emphasis on education shifts the responsibility from the State towards the individuals. The classification of climate change as a problem to be tackled by education, misrepresents the magnitude and scope of climate change. By shifting the responsibility towards the individuals, the policy makers avoid addressing the need of structural changes in the energy sector in order to mitigate climate change.

Unlike the climate change discourse, isolated environmental incidents relating to the energy sector, such as the case of Petacalco, were represented in a specific manner. The representatives defined the victims and assigned direct responsibility. This representation creates an understanding of the issue that needed to be solved. Furthermore, the representatives made references to familiar terms, which create closeness with the affected individuals and appealed to the Congress to protect the people. The differences in the environmental discourses showed that at this point climate change was not an urgent matter in the domestic debates and the resistance to integrate climate change matters into the energy sector. Nevertheless, the narrative of specific environmental incidents shows the lexical strategies that could be applied to the climate change discourse. In the following section I present the sociopolitical context and corpus analysis from the presidential term 2000 - 2006 of the president Vicente Fox.

6.2 Presidential term of Vicente Fox: 2000 – 2006

In the previous section I explored the reconstruction of the resource nationalism discourse in the presidential term of Ernesto Zedillo. Continuing with the discourse analysis of contemporary resource nationalism, in this section I analyse the presidential term of Vicente Fox. I begin with a discussion of the sociopolitical context from the years 2000 to 2006. I continue with an interpretation of the resource nationalism discourse in the debates from the Congress legislatures LVIII and LIX. I structured the analysis in four themes, including mythification of the historical resource nationalism, sovereignty, oil dependency and environmental aspects. In the following section I explore the sociopolitical context from the years 2000 to 2006.

6.2.1 Sociopolitical context

In the year 2000 Vicente Fox became president of Mexico, he was the first candidate of an opposition party who won a presidential election in over seventy years. Vicente Fox has a business background, but he became actively engaged in politics in the early 1980s out of frustration with the PRI's mismanagement of the economy. According to Loaeza (2006) in the long history of the Mexican presidency, Vicente Fox already holds a special position simply by having defeated the PRI, a powerful party that had survived the third wave of democratisation and still seemed invincible in the year 2000.

The National Action Party (PAN) had a long history of being an alternative to the ruling party. Professionals, intellectuals and entrepreneurs formed the National Action Party in September 1939. The party has historical connections to business groups, and religious activists who showed initial interest in the PAN due to the leftist and anticlerical tendencies

of the PRI in the late 1920s and 1930s. After the administration of Lázaro Cárdenas, the PRI was able to draw most businessmen back into the fold. As a result, the PAN lost most of its wealthiest supporters, and those who remained were committed primarily to the party's agenda of liberal-democratic reform and the protection of religious freedom (Shirk, 2000).

The PAN describes its philosophy as compassionate conservatism with a humanist philosophy that supports family rights, liberty of education, free practice of religion, and dignity of labour. It is considered an antithesis to the PRI's paternalistic orientation, given that PAN's philosophy encourages the individual's development, and aims to help citizens help themselves rather than offer government welfare. The PAN's path to the presidency was paved by a strategy focused on winning control of local and state governments. As a result, the decline in the PRI's electoral support over the previous decades benefited the PAN more than any other opposition party, as it progressively accumulated electoral victories at the municipal and state level during the 1980s, and the number of victories exploded during the 1990s (Shirk, 2000).

A central aspect of party identification is long-term commitment and similarities between the party philosophy and personal identity (Somuano and Ortega, 2003). In the Mexican political context, PRI and PAN are the parties that have long represented different groups of the population for several decades. Hence, each developed a core of the electorate that felt identified with them. That is why when the national action party won the elections in 2000, a sector of the population that was long underrepresented had great expectations for the new administration. Benitez (2008) argues that president Vicente Fox inherited three security issues from Zedillo's administration: the Chiapas conflict, drug trafficking and growing insecurity. These issues were crucial in the national security agenda during the presidency of Fox, and they added a long list of problems associated with virtually all range of vulnerabilities around the country.

During the Administration of Vicente Fox, the energy policy had very few changes. Fox's economic policies ensured continuity of the neoliberal model that was predominant in Mexico for over a decade. The energy sector was likely to be an area for restructuring, however much to the surprise of his critics, Fox did not attempt privatisation because it would be too controversial (Shirk, 2000). Even when at the end of Fox's administration, the government continued with a traditional energy policy, the administration showed a commitment towards an energy reform (Gutierrez, 2008).

The most important issue affecting the energy sector during Fox's administration was the sharp decline of proven reserves. Alongside, the technological arm of PEMEX, the Mexican Petroleum Institute, was almost disabled by the federal government. The tangible consequences of this are the inability of the firm to explore and exploit oil fields found in the Deepwater Gulf of Mexico. The imports of gasoline and natural gas amounted to 29% of PEMEX's account balance received from hydrocarbon sales. Buying gasoline and gas at high prices was the result of the refusal to invest in the industry (PEMEX, 2006).

Rising to new levels of debt the company's outstanding debt amounted to more than 50 billion dollars, 7% of GDP and almost 30% of total the public sector's debt (La Jornada, 2005). Nevertheless, during the Fox administration, the federal government handled the largest volume of oil money in the history of the industry, almost 127 billion dollars of exports. Furthermore, the government reliance on oil income increased by 10% by the end of the administration, from 35.5% in 2000 to 46.3% in 2006 (Gutierrez, 2008).

From the environmental perspective, the year 2005 was particularly relevant due to the impact of hurricanes in the country. Mexico was hit by hurricanes Emily, Stan, and Wilma. The hurricanes affected nearly three million people and left damages of over four and a half billion dollars (Zapata, 2006). These events led to more committed debates in the

Congress about global warming and its effects on the weather. In the following section I explore the corpus analysis from the years 2000 until 2006.

6.2.2 Corpus Analysis

In this section I present the elements of the resource nationalism discourse from the Congress legislatures LVIII and LIX. I begin with the mythification of the historical resource nationalism, and explore the perceptions and attitudes from representatives towards the heritage in the energy sector. I continue with a discussion of sovereignty, state ownership and foreign intervention, where I explore nationalist attitudes in the energy sector. I carry on exploring the perception of privatisation and oil dependency as well as the understanding of social justice as the goal of resource nationalism. I finalize this section with a discussion of the discursive representation of the environment in the Congress, including their approach to climate change. In the following section I discuss the mythification of the heritage in the energy sector.

6.2.2.1 Mythification of the historical resource nationalism

The representation in the Congress of the historical resource nationalism during legislatures LVIII and LIX, showed similar elements to the previous legislatures. Cárdenas was represented with adjectives that magnified his virtues, and with honorifics such as general or president, in order to emphasise his authority. The relationship between resource nationalism and social justice is represented as an essential part of Cárdenas idealism. During a speech regarding the commemoration of the revolution, representative Enrique Herrera of the PRD referred to Cárdenas' belief of using natural resources to ensure the welfare of the nation:

President Lázaro Cárdenas wrote that nothing can justify more eloquently the long struggle and sacrifices of the Mexican Revolution. Given that there are entire regions where the men of Mexico live alien to all material and spiritual civilization, sunk in ignorance and in the most absolute poverty, subjected to starvation, with lack of adequate income and housing. It is improper for a country like ours, which has enough natural resources to ensure a fairer civilization (Camara de Diputados, 2001d, pp. 83-84).

This understanding of Cárdenas' ideals gives legitimacy to the objective of social justice in the resource nationalism discourse. Thus, it provides the historical legitimacy for the state to use the energy sector as a means to achieve social justice. The representation of Cárdenas in the discourse has an element of obligation and loyalty towards him: "General Lázaro Cárdenas del Río was a great Mexican, an enormous Mexican who gave justice to the motherland ... we will honour the general if we defend the electricity industry and the oil industry" (Camara de Diputados, 2002c, pp. 82 - 83). The over-lexicalisation and use of honorifics in the representation of Cárdenas, aims to represent superiority and authority that deserves reverence. Hence, an obligation to honour him is established. The statement determines a condition to honour him, by defending the energy sector as evidence of loyalty.

The element of loyalty in the discourse can be explained by the perception of Cárdenas as a founder of modern Mexico. Representatives of the Congress acknowledged the role of Cárdenas in the construction of contemporary Mexico: "General Lázaro Cárdenas distinguished himself by having a profile of a statesman that had a clear project of a nation and an overview of the most pressing problems that afflicted the Mexico of his time" (Camara de Diputados, 2002c, pp. 82 - 83). This statement, as well as legitimizing Cárdenas' actions, shows him as the founder of the modern social structures. Alluding to a *clear project of a nation* denotes an understanding of change in social structures. Cárdenas was not continuing with the previous political regime, but constructing and legitimizing his own.

The representation of Cárdenas as the founder of modern Mexico was shown in various debates. During a discussion regarding a severe drought in the *Comarca Lagunera*,

global warming was briefly mentioned as a cause, and immediately after, the discourse shifted towards Cárdenas and the agrarian reform: “the unwavering will of Lázaro Cárdenas to carry out the agrarian reform as a State project... he not only promoted an action in favour of the *campesinos* but of the national economy and therefore of the population as a whole.” (Camara de Diputados, 2001b, p. 147). This debate illustrates how the figure of Cárdenas is used as the core of a speech. This approach leaves more relevant matters such as climate change with a weakened representation. The use of *state project* shows the understanding of the representatives that Cárdenas had broader intentions to construct new social structures, rather than to only implement isolated reforms.

The historical changes in the energy sector placed the name of Cárdenas as the main actor in the discourse. The grammatical positioning of Cárdenas name is often accompanied with terms such as nationalism, and sovereignty: “The values of General Lázaro Cárdenas, combined nationalism, and the independence of our sovereignty” (Camara de Diputados, 2002c, pp. 82). Positioning the name of someone, who is perceived as a hero, with terms such as nationalism, and sovereignty, validates the nationalist attitudes in the energy sector. In a debate that aimed to reform the energy sector, the representative of the PAN, Noé Navarrete González argued that the energy model of Mexico is reaching its limits and needed a structural reform. Congressman Navarrete stated that the energy sector needed to adjust to the contemporary needs in order for the nation to develop. Navarrete used honorifics and over lexicalisation when referring to the president Cárdenas.

This model has been adjusted during the different stages that the country has experienced, since the promulgation of the Constitution in 1917 to the present day ... I'm sure and I say with all due respect, that under the current critical conditions, in the same nationalist spirit that distinguished, General Lázaro Cárdenas and the lawyer Adolfo López Mateos, they would have also changed the energy model (Camara de Diputados, 2001a, p. 57)

The previous statement showed that even when the opinion regarding the energy sector is not the same as it was at the time of the oil nationalisation, the name of Cárdenas is

still linked to a nationalist spirit and referred to as an authority figure. In response to the previous arguments, the Congressman Roque Joaquín Gracia Sánchez from the PRI argued that even in 1938, when there were no economic resources, the industry was successful: “with the efforts, dedication, and hard work of many Mexican workers, and engineers we were able to discover, develop and exploit important oil deposits” (Camara de Diputados, 2001a, p. 58). This statement aims to justify the continuity of the energy model, based on its historical legacy. This approach dismissed the concerns regarding the currency of the model, and emphasizes the historical relevance.

The representation of the historical resource nationalism is similar to the previous legislatures in the Congress. Cárdenas is represented with an over-lexicalisation and the use of honorifics. He is perceived as an authority figure and essentially as the founder of modern Mexico. This perception creates a sense of obligation and loyalty in the members of the Congress. Cárdenas ideal of using natural resources to pursue social justice, justifies the nationalist approach to the energy sector. Furthermore, the continuity of this approach is understood as an obligation and evidence of loyalty to Cárdenas’ authority.

6.2.2.2 Sovereignty, state ownership, and foreign intervention

Foreign intervention was a salient theme in the resource nationalism discourse during the administration of Vicente Fox. The debates in energy policy, from increases in electricity prices to investment in the energy sector, established an antagonism with the federal government. The speakers represented the government as having intentions to *sell* the energy sector, and prioritize foreign interests over domestic interests. This representation was accompanied with the premise, that by *selling* the energy sector, the government would compromise the sovereignty of the nation. The reference to *selling* the energy sector was used as a means to add impact to the discourse, rather than an actual action from the government.

On September 20th of 2001 the Congress analysed the achievements in economic policy in the energy sector. In this session, the minister of energy Ernesto Marstens Rebolledo gave a speech to the Congress regarding the government's annual review. Afterwards the representatives discussed with the secretary their main issues and concerns of the sector. The Congressman José Manuel del Río from the party Convergencia used structural oppositions and presuppositions to argue that the government was serving foreign interests.

Oil is a resource owned by the nation, is not owned by the government nor PEMEX. The owners of oil are the Mexicans. Therefore, oil revenues should be reinvested in projects that will benefit them. We do not agree with delivering these resources to foreign investors... Our position, comrades, is that the sovereignty of the nation should be respected (Camara de Diputados, 2001a, p. 22).

The representative from the PRD Rosario Tapia Medina established a presupposition to argue that the government of the president Vicente Fox was trying to sell the energy sector to foreign companies: "In all media and promoted by Fox in all international forums, we appear like we are a country for sale" (Camara de Diputados, 2001a, p. 28). The representative Hernandez Raigosa, similarly argued that the government was trying to sell the energy sector to foreign companies. Congressman Hernandez used a metaphor to imply that the government considered foreign interests as a priority instead of domestic interests:

In the PRD, we are concerned that the Federal Government has been promoting an attitude of light of the street and darkness of his house. Why do we say this? Because, the government with great fanfare, presents abroad the possibility of selling the oil and energy industry (Camara de Diputados, 2001a, p. 29)

To the previous statements, minister Martens, argued that there were no foreign interests that came before the nation. Martens stated that the United States had no influence in the energy policy of Mexico: "Do we compromise with the United States? Ladies and gentlemen: no, no document has been signed that in any way jeopardizes our sovereignty, our property, and our management of the energy sector in this country." (Camara de Diputados,

2001a, p. 52). While minister Martens rejected the claim that the government was trying to sell the energy industry, Martens established a lexical relationship between sovereignty and the energy sector. Regardless of their political differences, the policy makers continued to reproduce the understanding of the relationship between the energy sector and sovereignty in the resource nationalism discourse.

In a similar manner, the following year the Congress analysed the government's annual report. Afterwards the representatives discussed with minister Martens their main issues and concerns of the sector. Martens stated that the main objectives of the energy policy were to ensure energy supply with standards of international quality and competitive prices, ensuring energy sovereignty and the continued guidance of the state.

The representative from Nationalist Society Party (PSN), Bertha Alicia Simental Garcia argued that independence and national sovereignty are the guiding principles that should stay and be based in the restructuring of our political, economic and social system. Hence the Nationalist Society Party would not agree to issue permits and concessions to exploit the strategic areas of the country such as, hydrocarbons, petrochemicals, and electricity within the national territory. Simental used structural oppositions and overlexicalisation to add impact to her speech and imply that the priority of the energy policy should be to protect the sovereignty of the nation: "The Mexican government must carry its mandate to protect the security and sovereignty of the nation... any proposal to reform the energy sector should have a fundamental premise that the nation is first, and Mexico is for the Mexicans" (Camara de Diputados, 2002b, p. 27).

The debate about the energy policy raised many questions such as increased electricity tariffs and the opposition towards the privatisation of the sector. The representative Rosario Tapia Medina from the Democratic Revolution Party argued that broad sectors of the population were affected by the increased tariffs in electricity and that the current energy

strategy would lead to the loss of sovereignty and social benefits: “they are not interested in these proposals being delivered to foreign capital... they do not care that in the long term there would be fewer social benefits for the population. They do not care that we would lose energy sovereignty.” (Camara de Diputados, 2002b, p. 32). In this statement, the speaker relates sovereignty with social justice, and establishes a presupposition that social justice would be affected by foreign investment.

The Congressman Raúl Sicilia Salgado, from the PRI was in favour of the energy policy regarding the electricity sector, Sicilia argued that the resources were not sufficient, and it needed to grant management autonomy to the CFE in order to solve the electricity problem. However, Sicilia argued that it should not be opened to foreign investment, because that would have negative consequences for national development. Sicilia’s statement had a resemblance of Cárdenas’ paternalistic speeches, when Sicilia argued that the workers of the energy sector had a very important role in the development of the nation and they should be protected. Sicilia used the strategies of collectivisation and nominalisation, to conceal the agency of the workers, when he referred to the workers as the unionism that needed to be defended:

We protect not only the national sovereignty, but also the workers, who have always demonstrated their responsibility and their love for the country. The PRI support and defend the Mexican unionism from internal and external aggressions. It is valid to make that recognition of these workers who have historically demonstrated their ability and patriotism (Camara de Diputados, 2002b, p. 46)

The Congressman from the PRD, Humberto Mayans Canabal, referenced the creation of the electricity commission in 1937, and presented Cárdenas in a positive way as a benefactor of the nation. Through the use of rhetorical questions Mayans presented President Fox and minister Martens in a negative way questioning the intentions of the government towards the energy sector:

You cannot forget that it was in the year 1937, when General Lázaro Cárdenas created the CFE and thus considered the electrical industry a public industry that should benefit the nation. Why would we deliver the national electricity market to domestic and foreign companies? ... Why do you and President Fox ignore the very serious failure of privatisation in Mexico, banks, roads, railroads, mills? Don't you learn from the past Mr. minister? (Camara de Diputados, 2002b, p. 46)

Representative Jaime Aceves Pérez, from the PAN talked about the possible scenarios that Mexico could face arguing that demand of gasoline exceeds the offer, hence Mexico has to import gasoline. This is an irony, because Mexico produces crude oil but due to a lack of investment the country has to buy more expensive petrol from foreign countries (Camara de Diputados, 2002b). To this matter Martens Rebolledo responded that the renovation and modernisation of refineries would reduce gasoline imports by 7%. However, there was a further need for more refineries but given the scale of investment required PEMEX could not cope with those investments.

The resource nationalism discourse in legislatures LVIII and LIX emphasised the antagonism with foreign investment. The speakers often used the term *sell* as a means to represent the actions of the federal government as giving away the decision-making capabilities provided by state ownership, for financial gain. This implied that the government was giving away the benefits of the energy sector, such as oil revenues and cheap energy rates. Thus, betraying the purpose of the energy sector's legacy.

6.2.2.3 Oil dependency, privatisation, and social justice

The discourse in the legislatures LVIII, and LIX, placed greater emphasis on the goal of social justice. However, the representatives established a division within society. In previous years, the goal of social justice in the resource nationalism discourse was understood as the use of natural resources for the benefit of the nation. In this premise, the understanding of the nation did not emphasise a division of class. During the years 2000 to 2006, the discourse shifted the understanding of the nation by indicating a class distinction in

the goal of social justice. Hence, the goal of social justice focused on benefiting only the people living in poverty. The representatives supported the use of subsidies in the energy sector and referred to Hugo Chavez's policies as a model to follow. The term privatisation was used as a means to add impact to the discourse and create a structural opposition, rather than being used as a description of a process.

A discussion about the increase in electricity prices referred to the goal of social justice, and argued in favour of subsidies: "It is not possible that before making the electricity service efficient... to be able to reach impoverished areas, very poor, very humble areas... we go for the easiest solution, from our desk we grab and remove subsidies" (Camara de Diputados, 2002a, p. 94). The statement establishes a presupposition of two mutually exclusive paths of action: reduction of subsidies or making the energy sector efficient. While the previous are not mutually exclusive, presenting this choice establishes unfairness in the energy policy. This claim of unfairness is highlighted by the use of adjectives such as poor, and humble, which represent a vulnerable sector of the population that is being taken advantage of. Hence, the statement appeals to protect vulnerable people from an unfair government, by maintaining subsidies.

In a similar narrative, during a discussion regarding lower gas rates for the elderly, deputy Pedro Avila Nevares from the PRI, referred to Chavez policies:

I ask to all my fellow Members, that the lower rate of gas should not only benefit the elderly. In Venezuela, President Chávez gifts the gas to the poor of Venezuela. I want to ask you to sell gas at a special rate to the humble people of Mexico, and to stop the current monthly price rise. President Fox offered in his campaign that gas and electricity would not be increased. So, I ask that this not to be exclusively for the elderly, but for all the poor of Mexico (Camara de Diputados, 2003, p. 104).

In this statement, we can see the use of adjectives such as poor, and humble. Avila establishes an element of unfairness by comparing the increase in gas prices with free gas from Venezuela. Avila Nevares referred to the historical heritage to justify his appeal for lower gas rates:

It was the great President Lázaro Cárdenas, who nationalized oil for all Mexicans. And it is precisely a product derived from oil production that we ask to be given at a special price for the elderly... We join this initiative full of patriotism! I ask all of our fellow deputies here, an applause for President Lázaro Cárdenas! (Camara de Diputados, 2003, p. 105)

The appeal to reduce energy prices in order to benefit the poor implies a specific economic benefit for a specific sector of the population. The speaker claims that this benefit is being denied by the government, thus the government is hurting a vulnerable sector of the population. Through this claim the speaker is positioning himself and his parliamentary faction as the defenders of this sector of the population and creates an antagonism with the government. In this narrative, the speakers focused on defending subsidies, a short-term economic benefit for vulnerable people, but the representative neglect to address the impact of subsidies in climate change, which has long-term implications for the livelihood of the population.

Alongside with the representation of social justice, the discourse showed a salience in the objection to privatisation as a way to increase the impact of the discourse: “We do not agree, nor our party will ever agree, to privatize the basic services of our country” (Camara de Diputados, 2002a, p. 95). The representative from the PT Víctor Antonio García Dávila, argued that the importance of oil and the generation and distribution of electricity are two activities that the State has always safeguarded, despite attempts to privatise them at different times by previous governments. In his speech Congressman Garcia uses synecdoche, a strategy which represents a single part as the whole. In this case, the workers, *campesinos*, and the youth are represented as the entirety of the nation. Garcia also used hyperbole and presupposition to argue that the entire population is against privatisation.

The government has an obligation to protect the nation’s interests... When President Zedillo sent the bill to privatise the electricity industry, the workers, *campesinos*, and the youth, mobilized all across the country to prevent this bastion of the national economy to be privatised... The people are not stupid or ignorant and do not cling to the past, but are firmly planted in the present and look clearly towards the future (Camara de Diputados, 2001a, p. 24).

In this statement, Garcia establishes a structural opposition with privatisation and creates a relationship with the protection of the nation's interests. Garcia refers to the mental processes of the people and presupposes that they are against privatisation in order to emphasise their capabilities to understand the implications of privatisation. The speaker refers to the historical legacy and claims that is not about *clinging* to the past, but about the effects that privatisation would have in the future.

The discourse of resource nationalism uses privatisation as a structural opposition. However, there is no specificity in what does privatisation entails. There is no consistency in the references to privatisation, whether it is allowing investment, management of certain activities or allowing the private sector to produce and sell electricity. Privatisation is used instead as a means to argue that the state companies should not be managed as business.

From this premise derives the understanding of social justice. The representatives imply that the objective of the state companies should be to provide cheap or free energy to the people. This understanding is problematic because it does not account for the consequences of subsidies such as a promotion in the use of fossil fuels and reduction in the efficiency of the energy sector. Furthermore, it establishes a choice between two oversimplified paths of action: a continued state ownership, and use of subsidies to achieve social justice or the privatisation of the industry, which would consequentially have a negative effect on social justice. Hence, this argument prevents the discussion of ideas that could address the needs of climate change without neglecting social justice, such as investment in clean and efficient transportation systems to reduce the need of fossil fuels or investment in renewable energies.

6.2.2.4 Climate change and environmental representation

The discursive representation of climate change in the corpus analysis continued to be perceived as a matter of foreign affairs. However, in the year 2005 Mexico was affected by hurricanes Stan, Wilma, and Emily. The impact and frequency of the hurricanes shifted the discourse on climate change. After these events, climate change was a more salient topic in the debates and the representatives discussed the domestic effects with an increased sense of urgency.

The representation of climate change in foreign affairs establishes the joint responsibility of the international community. However, this creates a distance with domestic policies: “Environmental problems do not distinguish borders, the commitment to sustainable human development is not exclusive to a single country, it is the responsibility of the international community” (Camara de Senadores, 2004a, p. 13). The statement establishes that environmental problems happen to all countries, which makes it an issue for the international community. However, the effects of climate change happen within the country and affect the people within the territory of Mexico, which makes it a domestic issue that needs domestic solutions.

The understanding of climate change was perceived as a distant issue and the salient aspects of the debates consisted in celebrating international efforts and agreements, such as recognising the decision of the Russian Duma to approve the Kyoto Protocol (Camara de Senadores, 2004b) or the United Nations movements:

Disasters from atmospheric phenomena have prevailed throughout history, but we must bear in mind that in the next 30 years calamities will increase considerably... Undoubtedly, developing countries are the most affected... But, fellow Congressmen, what country has not seen its territory affected by any of the events mentioned before? ... In this way, the United Nations has promoted a movement to prevent natural disasters. They designated every second Wednesday of October as the International Day for Natural Disaster Reduction (Camara de Senadores, 2004b, p. 42)

The lexical choice in the representation of climate change were often technical and theoretically descriptive: “Climate Change is caused by the emission of greenhouse gases and their accumulation in the atmosphere, is considered by many specialists as the greatest environmental challenge facing humanity in this century” (Camara de Senadores, 2005b, p. 148). The statement anonymises the specialists, who are the participants providing the validity of the evaluation. This creates a distance from the speaker, who does not provide a personal evaluation or opinion in the matter. The lexical choices, similarly to the previous legislations, use terms such as greenhouse gases and avoided the use of words such as oil or gasoline.

The speech regarding the hurricanes shifted the narrative of the discourse. This can be primarily observed in the use of *us* and *we*, as well as the use of verbs, such as suffer, regret and afflict:

The tragedy that hundreds of thousands of inhabitants suffered the effects of hurricane Stan and Wilma is the result of various factors that regrettably recur. It is not risky to affirm that in both cases the anthropogenic activities are the first cause of the ills that afflict us... mainly due to the excessive use of fossil fuels. We have weakened the ozone layer and with this has led to global warming and climate change victims (Camara de Senadores, 2005a, p. 60)

The speech provides a narrative of victims that are suffering the events of climate change. The statement *we have weakened the ozone layer* acknowledges responsibility and the *ills that afflict us* establishes a consequence of the human activities. The speech is not relying in anonymous specialists to gain validity, instead it is legitimised by a tangible event that people from the nation suffered. The discourse is further justified by recalling related events from the past: “In the last 15 years, we have suffered the impact of just over 20 hurricanes that have resulted particularly harmful to the country, leaving a long trail of victims, destruction, and death” (Camara de Senadores, 2005a, p. 61). The most important shift in the climate change discourse is the representation of the people who suffered the effect. This creates closeness and a sense of urgency that encourages to take action.

The representation of climate change was originally established as an issue of foreign affairs, described with technical terms. This created a distance from the speakers and the domestic responsibility. However, once the effects of climate change became more evident, the discourse also shifted towards a more empathic narrative. Nevertheless, there was continuity in the avoidance of terms such as oil and gasoline. This maintains a distance between the energy sector and the climate change discourse.

6.2.3 Critical Analysis

In this critique, I use a constructivist framework to reveal the structures of the resource nationalism discourse and understand the relationship with its historical and sociopolitical context. The corpus analysis of the presidential term 2000 - 2006 showed that the symbolic legacy of the energy sector was still a significant part of the resource nationalism discourse. Cárdenas' figure is particularly relevant in the interpretation of the Congressional attitudes of resource nationalism. Cárdenas is perceived as an authority figure and founder of modern Mexico. The strategic establishment of Cárdenas political regime allowed the PRI to perpetuate itself in power for several decades. This made the perpetuation in power of the PRI and the reconstructions of social structures of modern Mexico, mutually constitutive. This provides an understanding of the relevance of Cárdenas with the political elites.

The attitudes towards Cárdenas legacy includes an element of loyalty. The construction of Cárdenas regime enabled him to reproduce his own representation and the representation of his ideals through the education system. Decades later most Mexicans were taught this narrative as part of the national history, consequently linking nationalism with Cárdenas and his legacy. As Adler (2002) argues, historicity appears in the social reality as the building blocks of social processes. The representatives identify Cárdenas as part of the

patriotic values; therefore, any change of his legacy would represent a betrayal to their own core values.

Foreign intervention was a relevant theme in the resource nationalism discourse. The representatives used the verb *sell* as a means to create a structural opposition with the federal government. The use of the term *sell* was not directly referring to an action of the government. The underlying meaning implied that the government would give away the means to achieve social justice, hence betraying the purpose of the historical legacy in the energy sector. This represented the federal government as an accomplice of foreign intervention to damage the sovereignty of the nation. The narrative on foreign intervention is based in the presuppositions, which were in detriment of discussing the means to make the energy sector more efficient. Wendt (1992) argues that once an identity is established, agents deter systemic change because it would impact the intersubjective knowledge that a system is built on. This argument can explain the reluctance to change from the policy makers because a change in the understanding of the relationship between sovereignty and the energy sector would challenge the building blocks of the political system.

The representation of privatisation and social justice in the resource nationalism discourse was highly influenced by the political context of the presidential elections. Given that president Vicente Fox was the first president elected from an opposition party the representatives shifted the resource nationalism discourse, to create an antagonism with the government. The establishment of the federal government in a structural opposition was presented in the discourse through the use of privatisation as a means to deny social justice. Privatisation was used in a generalised manner without providing specifics of the process. The underlying understanding of privatisation was the management of the state energy companies with a business model. The representatives aimed to establish a link between the

management of the state companies through a business perspective with the denial of social justice.

Social justice was represented as the provision of cheap energy to vulnerable sectors of the population. The use of adjectives such as poor, and humble was used to justify the need for cheap energy. According to the speakers, the objective of the state companies should be the provision of cheap energy through the use of subsidies. The representatives justified this claim by referencing the historical legitimacy of the oil nationalisation. In this logic, the production of gas comes from the oil industry, therefore it should be used to benefit the nation with the use of subsidies. The representatives imply that any other action would represent a betrayal to the historical heritage and the authority that emanated from Cárdenas' government.

This representation of social justice creates an adverse discursive environment for the representation of climate change policies. It overly simplifies the understanding of social justice and prevents the debate on aspects that are crucial to reduce greenhouse gases emissions such as reduction of subsidies, investment in clean energies and decreasing the government dependency on oil revenues.

The discursive representation of climate change during legislatures LVIII and LIX was similar to the previous legislatures. Speeches on climate change used technical words and created a distance between the issue and domestic policies. Climate change was represented as an issue of foreign affairs that needed to be addressed by the international community. A shift in the narrative occurred after the hurricanes of 2005. The representatives spoke with a sense of urgency and established a narrative that appealed to the protection of the people in Mexico. This shift in the perception of climate change was related to the impact of its effects. Nevertheless, the lexical choices still used terms such as fossil fuels, and greenhouse gases, but avoided terms such as oil, and petrol. This creates a distance with the

responsibility of the energy sector and avoids potential conflictive issues such as the use of subsidies, and oil dependency.

Nedelmann (1990) argues that it is important to understand domestic norms in order to analyse international norms and processes. In the case of the international efforts to mitigate climate change, domestic efforts to reduce greenhouse gases are highly relevant to fulfil the goals of the international climate change agreements. The domestic norms of resource nationalism represent an obstacle to the international goals of climate change mitigation by hindering the domestic ability to implement ambitious climate change policy.

Conclusions

In this Chapter I presented the corpus analysis of the resource nationalism discourse during the presidential terms of Ernesto Zedillo and Vicente Fox. I contributed to the interpretative answer to the research question: How was the resource nationalism discourse presented from 1994 to 2012? In the analysis of each term I explored the sociopolitical context. I based the analysis on the debates from the Congress that were representative of the time and relevant to the resource nationalism discourse. This analysis enabled me to explore the elements of the contemporary resource nationalism discourse and assess the impact of the discourse on climate change policy. Thus contributing to the answer of the main research question: How does the resource nationalism discourse pose an obstacle for climate change policy in Mexico?

During the term of the president Ernesto Zedillo, there were many issues that impacted the beginning of the term, such as the assassination of the presidential candidate Luis Donaldo Colosio and the uprising of the indigenous people in Chiapas. However, even when the start of the term was difficult, there was political stability across the country. The

presidential term of Vicente Fox was very important due to being the first president from an opposition party in several decades.

In the corpus analysis, I identified the elements of the resource nationalism discourse. The understanding of these elements in the Congress has varied throughout the years, but their fundamentals have remained at the core of the discourse. The mythification of the historical resource nationalism is the main element in the discourse. Lázaro Cárdenas is regarded as an authority figure that established the social structures of modern Mexico. Hence, the energy sector is regarded as a legacy that needs to be used to benefit the nation.

The representatives in the Congress understood the goal of social justice as the main purpose of state ownership. Social justice in the resource nationalism discourse is represented as the use of natural resources for the benefit of the nation. However, the representatives do not specify how and to what extent the natural resources should be used to benefit the nation. State ownership is represented as the means to achieve social justice, by having control over the decision making in the energy sector. Thus, sovereignty is understood as the decision-making capabilities of the state, which makes participation of the private sector a threat to the control of the state.

Climate change was represented as an issue of foreign affairs and education, which created a distance with domestic policies, particularly in the energy sector. The discourse of resource nationalism creates an adverse environment to discuss measures for climate change mitigation, such as reduction of energy subsidies. In the following chapter I present an analysis of the presidential term 2006 – 2012, in order to interpret the understanding of the resource nationalism discourse during this term.

Chapter 7. Resource Nationalism Discourse and Environmental Representation from 2006 to 2012

The presidential term of Felipe Calderon was a flagship for the advances on climate change in Mexico. During Calderon's administration, the general law of climate change was enacted, making Mexico one of the first countries in the world to legally bind greenhouse gas emissions. Mexico was also an active participant in international efforts to mitigate climate change. In 2011 Mexico hosted the Cancun summit, where the international community discussed strategies to mitigate and adapt to climate change. In this chapter I present an analysis of the resource nationalism discourse and the climate change representation from this presidential term.

In the previous chapter I presented the corpus analysis of the resource nationalism discourse from 1994 to 2006. In this chapter I continue with the analysis of this discourse, based in the debates from the Mexican Congress from 2006 to 2012. In this analysis, I introduce the socio-political context from 2006, I discuss the polarised presidential elections and the controversies of the 2008 energy reform. I continue with the corpus analysis of the Congress debates. I explore the elements of the discourse including the mythification of resource nationalism, sovereignty, and social justice. I finalize with a critical analysis, linking the sociopolitical context and the corpus analysis. In the following section I introduce the sociopolitical context from the years 2006 to 2012.

7.1 Sociopolitical context

In 2006 the candidate of the National Action Party (PAN), Felipe Calderon Hinojosa was elected president in a very polarised and contested election. Calderon won with an advantage of 0.56% over the Democratic Revolution Party (PRD) Andres Manuel Lopez Obrador (IFE, 2006). The presidential term of 2006-2012 started with highly polarized elections and continued with disagreements between the president and the Congress; one of them was the attempt to reform the energy sector that resulted in a partial reform.

During the presidential term of 2006, the PRD represented the resource nationalist ideology in the Congress. Hence it is important to understand how this party started and evolved through the years. In 1987 Cuauhtémoc Cárdenas son of the ex-president Lázaro Cárdenas, left PRI due to the ideological changes that this party showed. Cárdenas, who showed a similar ideology to that of his father, decided to run for the presidency of Mexico in 1988. According to Reding (1997) and Castañeda (1993) Cárdenas had the lead on the campaign, but after an interruption of the computerized count, Carlos Salinas from the PRI was elected president.

After this conflict in the election of 1988, Cuauhtémoc Cárdenas and other former members of the PRI formed the PRD in 1989. Since then Cuauhtémoc Cárdenas has been the moral leader of the party. However, even when the majority of the members agreed with his vision of the party and an ideology based on the ideals of the revolutionary nationalism, factions of the party still had internal differences. Palma and Bladeras (2006) argue that the faction of Andres Manuel Lopez Obrador was a more irresponsible political current within the PRD, given the allegations of corruption from the members of his team and the way that Lopez Obrador dealt with them.

In July 2006, the federal elections took place. The main candidates, Felipe Calderon Hinojosa and Andres Manuel Lopez Obrador, had a very close difference in the margin of votes. The election showed a clear division amongst the north and south of Mexico. The north tended to support the president Felipe Calderon, while the south tended to support Lopez Obrador. According to Klesner (2007) there were many variables that showed the differences in the Mexican population, including regionalism, education level and social status.

When the preliminary results arrived, Lopez Obrador declared his victory, shortly followed by the declaration of victory from Felipe Calderon. However, the preliminary results had a margin of error and they were not legally valid. When the final results became public, Felipe Calderon was declared winner of the election. This was the start of a political tension that would remain for the rest of Calderon's presidential term. Lopez Obrador contested the results and after weeks of deliberation, the Electoral Tribunal of Federal Judiciary (TEPJF) legitimated the victory of Felipe Calderon (Schedler, 2007).

On September 1st, 2006 Felipe Calderon was declared president-elect but at the same time Lopez Obrador declared himself the legitimate president in a convention held in Mexico City. Maihold (2006) describes this as a parallel situation to the 1988 election, where Cuauhtémoc Cárdenas, the presidential candidate of the PRD, argued that the election of 1988 was a fraud. With the legitimate presidency claim, Lopez Obrador started what Schedler (2007) calls a rhetorical revolution, where the followers of Lopez Obrador started a resistance movement that lasted the entire term. The followers of this movement included members of the Congress from the PRD and the labour party (PT) amongst others. Alongside the civil resistance, there was a political alliance called Broad Progressive Front and was formed by the parties that backed up the candidacy of Lopez Obrador, including the PRD, the PT and Convergence Party.

Krauze (2006) refers to Lopez Obrador as the *Tropical messiah* whose ultimate goal is to rule Mexico and sees himself as social leader that has the legitimate right to rule. Krauze uses the name tropical messiah due to Lopez Obrador's life in Tabasco, a tropical state in Mexico and the fact that Lopez Obrador constantly uses biblical references to talk about himself and his path to gain the presidency.

One of the most important issues in the debates during the 2006 presidential term was the energy reform of 2008. As we have seen in previous chapters, the energy sector has been one of the most important symbols of national pride in Mexico; hence every effort to change the structure of the industry is put through severe scrutiny to decide the best way of action. The reform of the energy sector and PEMEX took place over seventy-two days of discussion of 2008 where an exercise of participatory democracy helped the members of the Congress to reach a decision over the matters of the energy sector. The exercise of participatory democracy included experts in the field and it was one of the most important processes of the debate leading to a partial success of the reform.

The energy reform was a polarized debate; the political tension of the 2006 elections was still part of the debate. The Broad Progressive Front began the peaceful civil resistance movement that occupied the stands for 16 days in the Congress, which ended after reaching an agreement to hold the national debate on the reform of the energy sector and PEMEX. The movement in defence of oil had two fundamental premises: no to privatisation and respect for the Constitution.

The proposal from the energy reform included the concessions to the private sector in non-strategic areas such as transportation, storage, and distribution of gas, oil, and its derivatives. It also proposed to allow private investment for the construction and management of refineries (Rodriguez, 2008). The reform proposal was discussed by the Congress and an

amended version of the proposal was approved. The seven fundamental points that were included in the reform are explained below.

1. Regulatory law of the Article 27 of the Constitution in the oil sector

The changes on the regulatory law are minimal; they maintain the exclusivity of PEMEX in the areas of exploration and exploitation of oil. Among the changes, the law contemplates that the transboundary reservoirs of oil would be exploited according to the international treaties, as in the case of the Gulf of Mexico.

2. Law of PEMEX

The changes to the law of PEMEX are mostly of an administrative nature, which includes the creation of commissions on auditing, performance evaluation, transparency and accountability among others. Regarding the contracts of PEMEX, the law establishes that the contractors would not be allowed to obtain a percentage over PEMEX profits or sales. This clause is to keep exclusivity and control over the hydrocarbons.

3. Law on the energy regulatory commission.

The changes on this law include the extension on the regulated activities in the energy sector, such as storage and transportation, to maintain regulated the prices of energy.

4. Law on use of renewable energies and financing the energy transition.

This law was created to establish the strategy over the use of renewable energies. Including the mechanisms of participation of the private and public sector over the production and exploitation of renewable energy sources. It is important to mention that the enactment of this law was an important step for the later legislation of the general law of climate change.

5. Organic law of the federal public administration

Article 33 of this law was modified to increase the capacities of the ministry of energy allowing it to diversify the energy strategy but always following the principle of sovereignty among others.

6. Law of the national hydrocarbons commission

This law creates the national hydrocarbons commission, which is responsible for contributing with the technical aspects to design the policies over production and exploitation of oil. The main objectives of this commission are to maximize the oil revenue and also regulate and supervise the oil production and exploitation.

7. Law for sustainable use of energy

The final point of the reform includes the creation of this law for sustainable use of energy, which main objective is to promote an efficient use of energy in all processes, from production to consumption. This law also establishes a precedent for the enactment of the general law of climate change (CEFP, 2008).

The previous points of the reform, present two important issues. First, the issues of exclusivity did not change and also the concept of sovereignty is included in the energy policy. Secondly, the reform of 2008 established an important precedent for the general law of climate change, with two important laws passed, the law of sustainable use of energy and the law on use of renewable energy and financing the energy transition. In the following section I present the discourse analysis of the resource nationalism discourse from the presidential term of Felipe Calderon.

7.2 Corpus analysis

In this section I present the examples of the resource nationalism discourse over the 2006 presidential term. In this corpus analysis, I present a discussion of the resource nationalism discourse and its salient elements. The analysis includes examples of the resource nationalism discourse over the debate leading to the energy reform of 2008, which was the biggest attempt to reform the energy sector during the 2006 presidential term. I begin exploring the references of the historical resource nationalism. I continue with the nationalist perspective of state ownership within the energy sector. I follow with a discussion on oil dependency and social justice in the resource nationalism discourse. I finalise the corpus analysis with a discussion on how the resource nationalism discourse was used as a means to claim political legitimacy. In the critical analysis, I link the discourse with the sociopolitical context, including social movements and the election of 2006.

7.2.1 Mythification of the historical resource nationalism

In this section I present the Congressional references to the historical events that lead to the state ownership of the oil industry. Congress representatives use the historical political figures to add impact to the discourse, magnify the importance of state ownership and the sacrifices that the people made to obtain the control of the energy sector. Hence, the discourse represents the Mexican energy sector as a valuable heritage that should be protected by the nation, which in this context means state control. In the following part of his speech, the legislator Ricardo Cantú Garza from the Labour Party, referred to the historical legacy of the oil nationalisation regarding the movement in defence of oil:

This movement is an extension of the defence of oil as millions of Mexicans did at the time of General Lázaro Cárdenas, when the oil industry was nationalised for the benefit of the nation. In 1938 the owners of the foreign oil companies said that the Mexicans were not able to develop and maintain the oil industry. Even the owner of Shell stated publicly that in two weeks the filthy Indians would be asking the help of technicians from the company. The reality was different. Mexicans themselves possessed and demonstrated that we have the technical, administrative, professional ability and willingness to drive that task with unwavering patriotism (Camara de Diputados, 2008, p. 177)

The deputy Cantú Garza used overlexicalisation to give more impact to the patriotism of the people. Cantú Garza used personalisation when referring to Lázaro Cárdenas and presented him as a historical hero by placing him on the patriotic end of the discourse. The final and most important element is structural oppositions where a foreign company is presented as the enemy of the nation. In this part of the speech there is a reference to the owner of Shell describing the Mexican people as *filthy Indians*, a term that was also found in the colonial precedent of foreign exploitation. This indicates that the representatives still reproduce the understandings learned from colonial times by recalling the foreign perception of the Mexican people. In the speech of the Legislator Claudia Lilia Cruz Santiago from the PRD we can find a historical reference from the oil nationalisation, Cruz Santiago stated:

Many years ago, in this nation, General Lázaro Cárdenas coined the phrase *we recover*, precisely talking about oil and the future of the nation. In that time, the people of Mexico paid the foreign multinationals, with their own money, their own property, their legacy, each one of the oil drops that today shelter our nation (Camara de Diputados, 2008, p. 205).

The narrative in this statement, presents a history of sacrifice that makes the ownership of the oil industry legitimate. The Congresswoman used the strategy of personalisation, when mentioning Lázaro Cárdenas, given that in the context is one of the most important actors in the historical background, it adds impact to the speech and sends a message of the importance of the historical heritage. The phrase *we recover* used by Cárdenas can also be interpreted as a recovery from the years of foreign exploitation, which increases

the symbolic relevance of the oil nationalisation as a means to obtain justice. Cruz Santiago uses over lexicalisation to add emphasis on the effort that the people did in 1938 to obtain the benefits of the oil industry. Cruz Santiago also uses collectivisation and structural oppositions to place on one side the people and Lázaro Cárdenas and on the antagonistic end, the foreign multinationals.

The previous statements show a prevalence in the relevance of the historical resource nationalism. Nevertheless, the representatives narrate the history in a magnified way, by putting emphasis in characteristics, such as bravery and sacrifice.

7.2.2 Sovereignty, state ownership, and foreign intervention

In this section I present the examples of the nationalist perspective on state ownership over the energy sources. The representatives quoted below present an argument about the importance of the ownership and exploitation of the energy sources by the state and the perceived dangers of the participation of the private sector. The legislatives associate state ownership with the concepts of sovereignty and the nation.

The Congressman Alfredo Adolfo Ríos Camarena, from the PRI used deontic modality, a lexical strategy that aims to influence others through the use of imperatives. Ríos argued that the sovereignty of the nation was threatened by the privatisation of PEMEX, Ríos Camarena said, “If we privatize PEMEX for the immediate future, we would not only lose the sovereignty of the nation, but we would also lose the entire country” (Camara de Diputados, 2008, p. 184). However, this is a presupposition given that the aim of the reform was not to privatize PEMEX, however the Congressman used epistemic modality, which shows the speaker’s certainty of a future situation, by implying that a privatisation would happen. This statement is similar to previous legislatures, where the perception of

privatisation represents a threat to sovereignty or the decision-making capabilities of the state over the energy sector.

The representative Ricardo Cantu Garza from the Labour Party argued, “Thanks to the efforts of millions of Mexicans across the country, oil was maintained as national property as well as all activities related to it” (Camara de Diputados, 2008, p. 177). In this part of the speech, the legislator used the strategy of collectivisation, when talking about *the efforts of millions of Mexicans*, in order to give more impact to the discourse and imply that the debate over the Congress was backed up by *millions of Mexicans*. Therefore, providing legitimacy and support for state ownership. However, the oil industry is owned by the state and the fact that the legislator uses the term nation instead of state presents a clear indication of the appeal to the popular support, which includes a similar element to the ones found in the historical resource nationalism discourse.

The Deputy Ricardo Cantú Garza, argued against oil privatisation, regarding concerns of oil being taken by foreign corporations. Cantú Garza argued, “We are certain that they do not provide adequate assurance that the company will not be split into blocks for international oil companies to take ownership of Mexican oil” (Camara de Diputados, 2008, p. 177)” In this part of the speech, Cantú Garza used dynamic modality, a lexical strategy where the speaker predicts future events, to indicate the likelihood of the oil industry being split into parts that could be taken by foreign companies.

The strategy of collectivisation can also be found at the end of Cantú Garza’s speech “Our differences are secondary issues that would not divide us, we will continue to defend our natural resources, in this case oil. The nation is not for sale! The nation must be loved and defended!” (Camara de Diputados, 2008, p. 178) The difference between this statement and previous statements is that in previous statements the strategy of structural oppositions was often used to refer to political parties with different ideological background, however in this

statement, Cantú Garza gives a nationalist message referring to the protection of oil as the continuity of traditional energy policies, and state ownership.

During the debate to reform the Law on the Use of Renewable Energy and Energy Transition Financing, the deputy José Antonio Almazán Gonzalez from the Democratic Revolution Party argued that the reform to this law violates the constitutional article 27, and tries to put in private hands the exclusive right to use new sources of electricity generation including wind, solar, geothermal, ocean and bio energy.

The representative José Antonio Almazán Gonzalez stated, “I am opposed to this interpretation that allows private monopolies to profit from electricity, turning it into a profitable business instead of public service that constitutionally belongs to the nation” (Camara de Diputados, 2008, p. 189) This statement shows that a nationalist discourse, can also be found on electricity issues and not only in the oil debate. This part of the speech also shows that the position of the legislator is against private ownership, regardless the country of origin.

To this matter the legislator stated that it is solely for the nation to generate, transmit, transform, distribute and supply electricity that is intended to provide a public service. Almazán Gonzalez assured that in this matter, no concessions would be granted to individuals. Considering this, the Congressman presents an example of how the private sector and individuals, regardless of nationality are not considerate as suitable administrators of the energy sources.

7.2.3 Oil dependency, privatisation, and social justice

In this section, I explore themes of privatisation, social justice and oil dependency. I focus on the salience of class division elements in the representation of nation. The representatives of the Social Democratic Party and Democratic Revolution Party associate the

concept of nation with a specific segment of the population. They refer to *the poor* as the main component of the nation. The legislatives often use structural oppositions to refer to the economic elites and the private sector as antagonists of the nation. This expresses a strong sense of social class division in the discourse.

The legislator Aida Arvizu Rivas from the PSD stated her concern about the results of the energy reform, if passed. Arvizu Rivas stated, “with historical and substantial reasons, we distrust the greed of economic elites, who will be able to bend the law and find a loophole in the law” (Camara de Diputados, 2008, p. 173) The Congresswoman used the word greed to establish a negative evaluation placing the private sector in a structural opposition with the state. The representative implies that the economic elites would take advantage of the reform and have a negative impact in the sector. To this matter the Congresswoman specified, “remember that policy makers can only do what the law explicitly allows; and this law does not allow the privatisation of our oil” (Camara de Diputados, 2008, p.173). The Congresswoman used presupposition to argue that the reform would allow the privatisation of oil, which would be against the law.

On his speech Javier Gonzalez Garza, from the PRD tried to add impact to his claims by using structural oppositions when saying “We do not accept the fate of poverty for many and wealth for the few.” Gonzalez argued that a privatisation of PEMEX would only lead to poverty for the people. The Congressman closed his speech with a statement often used by the members of the national movement in defence of oil: “we are prepared to face the future with hope, which for the sake of all: first the poor. No to privatisation of PEMEX! Never fraud! The nation is not for sale, the nation must be defended!” (Camara de Diputados, 2008, p. 173) This statement establishes a relationship between the resource nationalism discourse and the class division. Gonzalez states that the privatisation of PEMEX would affect the people with scarce resources and uses structural oppositions to give a sense of an *us vs. them*

relation as well as using argumentation to present this group as defender of the people with scarce resources. The statement illustrates the relationship of the resource nationalism discourse with the sociopolitical context, when stated: *no to privatisation, never fraud*. The resource nationalism discourse was used to claim the Lopez Obrador as a legitimate president.

The Congressman Pedro Landero López of the PRD argued that the reform would leave open the possibility of fuel trading schemes, which Landero Lopez argued violate the Constitution. The Congressman stated that the reform “allows corruption and allows private companies to profit from our fuels, thus exposing them to free market prices. This would leave the poor families defenceless and increases the cost of the consumer basket” (Camara de Diputados, 2008, p. 199). Landero Lopez, similarly to other representatives, used hyperboles to increase the impact of the speech. The paternalistic discourse of Landero makes reference to a social class division, and positions the state as the only protector of the *poor families*, thus removing the agency of the families. When the Congressman said, *leave the poor families defenceless* the words families next to the word defenceless tries to create a sense of protection and sympathy towards his cause.

The representative Valentina Valia Batres Guadarrama from the PRD uses a pronoun versus noun division, a strategy used to align the people to the speaker’s ideas by creating distance between the *us* and *them*. Batres uses this strategy by stating the differences on the interests of the people and the *others*: “today they wanted to file a misleading initiative, they wanted to put risk contracts and stimulus for private interests; but the people are not interested in that” (Camara de Diputados, 2008, p. 201) The legislator used collectivisation when talking about the *interests of the people*, however if she referred to the interests of all the people it would include domestic private interests. Hence the position of the legislator

lead to the assumption that Batres Guadarrama only aim to appeal to certain segments of the population and not all the people.

The representatives present the concept of the nation with a sense of collectivism. The representatives refer to the wishes of the people and the will of the people as a single element. The political factions present elements of their own ideology as part of a single will of the people. The Congresswoman Valentina Valia Batres Guadarrama from the PRD, expressed an *us vs. them* division when saying, “We have been discussing how to trust those who have stolen the wealth of Mexico, wealth derived from oil extraction. How to trust those who stole the money that belongs to the people?” (Camara de Diputados, 2008, p. 202). The legislator obscured the actors by using the term *those* which allows the message to pose a structural opposition and create distance by not specifying who she was referring to. The deputy also used the strategy of collectivisation, when referring to the people and sending a message the benefits of oil production are for all the people. Finally, with the strategy of argumentation, Batres Guadarrama presents the image of the party as part of the people who are fighting to defend the ownership and benefits of oil production.

The Congressman Jesus Cuauhtémoc Velasco Oliva from the Convergence Party stated in his speech, “It is clear that we cannot divide the profit of a state enterprise between bondholders because that wealth belongs to the nation” (Camara de Diputados, 2008, p. 174). With this statement, the Congressman used collectivisation when using the term nation. However, the term nation has a broad range of interpretations, in this case I argue Velasco Oliva is referring to a collective sense of ownership, where the wealth is used for social programs amongst others that would benefit the general population.

The legislator Aída Marina Arvizu Rivas from the PSD stated a concern about how the reform would allow the energy sector to be taken in control of the private sector. Arvizu Rivas said, “the qualified reviews against privatisation gave consistency to the strong desire

of most Mexicans.” (Camara de Diputados, 2008, p. 173) In this statement Arvizu Rivas used presupposition by assuming that most of the population would have the same desire about the future of the energy sector. The deputy used anonymization by referencing *qualified reviews* without giving more specifics about the reviews that she mentioned. Finally, she uses collectivisation when talking about the wishes of most Mexicans, while there were manifestations of certain groups, it did not mean that most Mexicans felt the same way.

In the discussion of views on the draft decree amending and supplementing a number of articles of the Law Regulating Article 27 of the Constitution in the Petroleum Sector, the Congressman Pedro Landero López of the Democratic Revolution Party used the strategy of argumentation to give a good image of his party faction. Landero López argued, “the only interests that are behind us are the people. Therefore, concerned about the situation we analyse we want to freeze food prices, taxes and services, and achieve reduced energy costs” The intention of this statement was to show that the party was only concerned about the importance of keeping the prices of energy down, in order to benefit the people. This can also be linked to the reduction on subsidies, which the representatives of the PRD were against.

7.2.4 The resource nationalism discourse as a symbol of political legitimacy

During the presidential term of Felipe Calderon, the resource nationalism discourse was used by Lopez Obrador as a tool to support his claim of legitimacy. The resource nationalism discourse was used as a symbol to further a political agenda, in a similar manner as the one developed by Lázaro Cárdenas. In the contemporary context, Lopez Obrador, used the oil as a symbol of nationalism and a *treasure* that needed to be protected. Hence, representing himself as the protector of the nation. In this part of the discourse analysis I found a strong use of the structural oppositions strategy, by the parliamentary factions of the Democratic Revolution Party, the Labour Party, and Convergence Party. The representatives

of these factions present the former President Felipe Calderon in a negative light, while Andres Manuel Lopez Obrador is often presented on the positive side of the spectrum.

The Congressman Javier Gonzalez Garza from the democratic revolution party uses a series of strategies to influence the Congress, arguing that an energy reform would eventually lead to the privatisation of PEMEX. Gonzalez Garza was a member of the national movement in defence of oil, a movement that was started by the former candidate to the presidency Andres Manuel Lopez Obrador.

In his speech on October 28 of 2008, Gonzalez Garza stated, “We stopped the massive plunder of the nation, together the legislators and the national movement in defence of oil” (Camara de Diputados, 2008, p. 171). In this phrase Gonzalez Garza used argumentation to give a positive presentation of the movement and presented themselves as the victorious defenders of the nation. The Congressman used a presupposition, taking for granted that the energy reform was a way to privatize PEMEX.

With a similar speech, the Congressman Pedro Landero López of the PRD used structural oppositions to refer to the former president Felipe Calderon and Lopez Obrador, placing them in opposite ends of the spectrum:

I remember in the campaign proposed by the legitimate president, Andrés Manuel Lopez Obrador, he proposed to lower energy prices while Mr. Calderón, was being opportunistic and misleading people, as well as many other things he pledged that he was also going to lower energy prices. But what is he doing now? He is doing exactly the opposite. (Camara de Diputados, 2008, p. 199)

With this statement, the Congressman placed Felipe Calderon on the negative end of the structural opposition by using over lexicalisation and describing him as “opportunistic and misleading”. The Congressman stated the importance of low energy prices placing subsidies as a way to benefit the population.

The Deputy Ricardo Cantú Garza, of the Labour Party remarked the importance of defending oil, alongside with a reference to the *independent project of a nation* which refers to Lopez Obrador's claim to the presidency.

Lawmakers of the Parliamentary Group of the Labour Party never give up the defence of our national wealth and sovereignty regarding our oil and our territory. At all times, we will be alongside the millions of Mexicans who are committed to an independent project of the nation, away from any neoliberal dogma and subordination to the rulers (Camara de Diputados, 2008, p. 1178)

Cantú Garza starts with the strategy of argumentation, giving his party a positive self-presentation as a defender of the national wealth. The representative establishes the relationship between sovereignty and oil in a manner that resembles the historical discourse of resource nationalism. The legislator continues with structural oppositions placing the labour party and other parties that backed up Lopez Obrador on one end and the neoliberals from other parties on the other end. The deputy also uses collectivisation when referring to the people that are *committed to an independent project of a nation*, in order to establish the legitimacy of Lopez Obrador's claim.

Continuing with his speech Cantú Garza stated, "outside this building, millions of Mexicans are protesting! Mexicans who since June 2006 engaged in the struggle for the democratisation of our institutions and the defence of our natural resources" (Camara de Diputados, 2008, p. 177). The representative used aggregation when talking about *millions of Mexicans* but also giving the context it is a strategy of collectivisation where the common ground is the defence of the natural resources.

The Congresswoman Valentina Valia Batres Guadarrama from the Democratic Revolution Party uses rhetorical questions to add impact on her speech, Batres Guadarrama includes references to the 2006 presidential election and the decreased subsidies gasoline. The legislator asked, "could I trust you? when you promised to lower the price of gasoline and we had more than twenty-one increases in the price of gasoline this year, Could I trust

him? Could I trust Calderon when he stole the election?" (Camara de Diputados, 2008, p. 106). The legislator uses rhetorical questions alongside a presupposition to argue that the president Felipe Calderon *stole the election*. This claim, that many legislators mentioned, is an example of the antagonistic position of the political parties during the presidential term of Felipe Calderon and the claim of legitimacy of Lopez Obrador.

Jesus Cuauhtémoc Velasco Oliva Congressman from the Convergence Party used the strategies of personification when talking about Felipe Calderon to imply responsibility of this political actor. Velasco Oliva, stated, "The promises of the then-candidate Calderon, were to create jobs, not to privatize the oil industry; however, in the end, we have seen how he has promoted the privatisation of our oil company." The legislator uses the strategy of presupposition by assuming that the ultimate end of the energy reform is to privatize the oil industry.

From the PRD, the Congresswoman Monica Fernandez Balboa talked about the reaction of the Broad Progressive Front, a mobilisation from the National Movement in Defence of Oil. This movement expressed a strong opinion against privatisation, Fernandez Balboa stated, "Mexico has spoken and said that privatisation will not happen once again in this country, Calderon's proposals and lies will not prosper" (Camara de Diputados, 2008, p. 150). Fernandez Balboa used collectivisation when talking about *Mexico* and applied a personification strategy by saying *Mexico has spoken* it gives human characteristics to the country. By using the strategies of collectivisation and personification together, the message sent represents a collective will over the future of oil. Fernandez Balboa utilizes specification when referring to the former president Felipe Calderon alongside with over lexicalisation, presenting him in a negative context by using the term *lies*. The negative context in which the former president Felipe Calderon is presented is part of a strategy of structural oppositions,

where the collectivisation strategy used in the word *Mexico* represents the positive end of the opposition.

The deputy Ricardo Cantu Garza from the Labour Party gave a speech after the energy reform debate finalized. Cantu Garza said, “the social mobilisation, led by Andrés Manuel Lopez Obrador, prevented the privatisation initiatives that Calderon approved in the Senate of the Republic” (Camara de Diputados, 2008, p. 178). In this speech, the legislator used the strategies of personalisation when talking about Lopez Obrador and the president Felipe Calderon. Cantu Garza presented them with structural oppositions, Lopez Obrador was presented as if he defended the nation from privatisation. Cantu Garza used the strategies of argumentation and presupposition by assuming that the reason a privatisation did not occur was because of the actions of Lopez Obrador. However, privatisation was not going to happen because it was not a goal of the reform. Nevertheless, the representatives often used the resource nationalism discourse as a tool to legitimise Lopez Obrador’s claim to the presidency. It is in this presidential term that the resource nationalism discourse was used to legitimise political power in a similar manner as the legitimisation strategy of Cárdenas regime. In the following section I discuss the representation of climate change in the presidential term of Felipe Calderon.

7.2.5 Climate change and environmental representation

The presidential term of Felipe Calderon was characterised by the efforts towards the mitigation of climate change. In Calderon’s term, the climate change discourse was very relevant, particularly in the discussions regarding the establishment of a policy framework including the general law of climate change.

However, the discursive representation of climate change has similar elements to the previous legislatures. Climate change mitigation is represented as a responsibility of the

international community, therefore the actions in domestic policies are a response to international norms. The discourse continued to generalise the effects of climate change and use technical terminology:

The mitigation of the adverse effects of climate change, through the reduction of greenhouse gas emissions, which in turn help to prevent the intensity of hurricanes and storms. Their rise in the future is a consequence of the rise of the sea and the modification of coastal ecosystems, which are estimated as adverse effects that our country will face as a consequence of climate change (Camara de diputados, 2009, p.104)

This representation, while accurate, creates a false sense of distance between the effects of climate change and the domestic implications. The lack of specificity, does not address who are going to be directly affected, and how the livelihoods of communities will be disrupted. The technical terms in the discourse do not provide familiarity to the issue, which makes it seem not as relevant in terms of protecting those who will be affected. The representation of climate change as a problem for the international community to solve reduces the responsibility of the government and the urgency of domestic actions:

The mitigation of climate change is a challenge that requires clear and common responsibilities that must be assumed by the countries of the world, since their impacts go beyond the environmental: it is a transversal problem that needs to be treated with a multilateral approach. Being a problem with temporary dimensions requires the implementation of long-term actions but acting immediately (Camara de Diputados, 2009e, p.92)

Describing climate change as a problem that needs a multilateral approach by all countries in the world reduces the impact in the audience, given that the speech is addressed to domestic policymakers. Therefore, it is important to emphasise the relevance and urgency of domestic actions. The effort of Mexico in the international community are crucial for climate change mitigation, but its representation as an international matter, reduces the impact in domestic policies: “Mexico has, as you know, an active presence in all forums and multilateral organizations ... it allows us to contribute to the search for solutions to global

challenges such as climate change, food and energy security, and sustainable development.” (Camara de Diputados, 2009b, p.17).

A further issue in the representation of climate change as an international issue, is the element of compliance: “Our country committed itself to mitigate the emission of greenhouse gases ... Therefore, the Mexican State must propitiate the mitigation of emissions that cause one of the main global threats of this century” (Camara de diputados, 2009c, p.59). This discursive representation implies that domestic policies are being changed in order to comply with international norms. This kind of representation is problematic because Mexico has a history of rejecting foreign intervention, as I have argued in the case of resource nationalism. Consequentially if climate change policy is represented as an obligation to comply with international agreements it could create a reluctance from the policy makers to address climate change as a priority. This illustrates the importance of representing climate change as a domestic priority and describe the consequences of climate change in the livelihoods of the population as well as the need to effectively implement climate change policy.

When facing specific events related to climate change such as drought or floods, the climate change discourse becomes more familiar. The representatives address the specific places affected and use adjectives to increase the relevance of the discourse:

Undoubtedly, climate change is today the main problem of our time. The tremendous floods are not unfamiliar to the inhabitants of Tabasco, Veracruz and other regions of our country. This unstoppable phenomenon is propitiated by the suicidal behaviour of men when they deforest, pollute rivers, and degrade ecosystems (Camara de Diputados, 2009d, p.155)

Climate change should be addressed with more specific and familiar terms, in order for the discourse to gain relevance. It is important to emphasise the need to prioritise domestic policies in climate change mitigation, and internalise the discourse as a need of social justice, rather than a foreign affair.

This corpus analysis showed some important points about the relevance of the political context during the attempts to reform the energy sector, it also shows prevalent historical references and a strong sense of nationalism when discussing energy issues. Some of the most important aspects found in this corpus analysis are the role of state ownership, the social class division in the discourse, and the sense of collectivism when referring to the nation and the exploitation of energy sources. In the following section I provide a critical analysis to explore the links between the sociopolitical context and the discourse over energy issues.

7.3 Critical analysis

In this section I present a critical analysis of the elements of the resource nationalism discourse found in the corpus analysis. I use a constructivist framework to provide immanent, socio-diagnostic, and prospective critique for the analysis of the discourse (Glynos et al, 2009; Forchtner, 2011; Wodak and Meyer, 2009). The elements that I explore are the relationship of the discourse with the historical and sociopolitical contexts, and more specifically with the elections of 2006. I discuss the resource nationalism discourse and the position of the political parties over energy issues, including concessions to the private sector and subsidies. The presidential term of 2006 – 2012 had important debates over the energy sector. In 2008, the Congress was open over a period of seventy-two days in a process of participatory democracy, in order to include a wider opinion on the energy debate. However even when many specialists and groups involved in energy issues were invited to express their opinions, the Congress debates seemed to have a more political and ideological perspective.

After the 2006 elections, several members of the Congress from the PRD and the PT factions among others, expressed their animosity towards the results of the election. They continued to support the former candidate Andres Manuel Lopez Obrador as a *legitimate president*. This issue was reflected in the discourse analysis where many members of Congress, especially from the PRD, antagonise the president Felipe Calderon.

From the corpus analysis, we can see that the members of the PRD, PT, PSD, and Convergence party are the ones that present a higher level of engagement in the resource nationalism discourse. The representatives also use the discourse as a means to establish a structural opposition with president Calderon. The main participants presented in the discourse are: former President Felipe Calderon, former presidential candidate Andres Manuel Lopez Obrador, political groups such as the Broad Progressive Front and the National Movement in Defence of Oil. The main strategies used in the discourse are structural oppositions, collectivisation, over lexicalisation and argumentation. The strategy of structural oppositions was the basis for the discourse presented by the legislatives from the parties previously mentioned.

The representatives used structural oppositions that placed the president Felipe Calderon as an antagonist in the discourse. The president Felipe Calderon was represented with adjectives and over lexicalisation. When referring to Calderon the legislators associated his name with terms such as, opportunistic, misleading, lies and privatisation. The term privatisation is represented in a negative context. This denotes the rejection of the political parties towards the private participation in the energy sector, which I explore further in this section.

On the other side of the structural opposition, the representatives established Andres Manuel Lopez Obrador alongside with the political groups and movements that supported him such as the national movement in defence of oil and the broad progressive front. The

main strategies that the legislators used to present Lopez Obrador and his supporters were collectivisation and over lexicalisation. The legislator associated Lopez Obrador's name with words such as defence, protection, legitimate, Mexico, and nation.

The terms nation, and nationalism, expressed by the representatives from the PRD and the PT among others, were closely associated with elements of state ownership, class division, and collectivism. The understanding of the resource nationalism discourse was that the energy sources should benefit the nation. The representation of the nation was established with the strategy of collectivisation, where a specific sector of the population is presented as the entire nation.

The discourse included an understanding of state ownership over the energy resources, where state ownership was represented as the means to deliver social justice. Smith (2010) states that one of the most important interpretations of nationalism is the sentiment of belonging to the nation. According to this definition, I argue that the sentiment of belonging does not only apply to being part of an imagined community (Anderson, 1991), but also as a shared sense of ownership. Given the historical heritage of the oil industry, I argue that the idea of ownership has been constructed and reconstructed over the years, reinforced by the education system and the political doctrines of parties such as the PRD. Modern Mexico developed its national identity in the twentieth century and the oil nationalisation was a cornerstone to break with the history of foreign exploitation. Wendt (1992) argues that when a social system is constituted certain behaviours are reinforced. I argue that resource nationalism is a social behaviour that has been reinforced throughout the years and represents a building block of the national identity.

Alongside with the shared sense of ownership, I argue that there is also a sense of duty from the members of the political factions previously mentioned. This sense of duty is related to the historical resource nationalism. The continuity of the traditional energy policies

represented the loyalty towards the legacy of the energy sector. The legislators are the representatives of the population and they define the behaviour of the state. Therefore, the legislators that have a higher nationalist ideology, feel the duty to act on behalf of the nation and protect the national resources. In the discourse, the state is presented as the protector and rightful administrator of the energy sources. I argue that this discourse is originated from the shared idea of national ownership over the energy resources.

History is a building block in the social reality, the reproduction of behaviour is part of the mutual constitution of agents and structures (Adler, 2002; Wendt, 1992). Thus, the behaviour of policy makers reproduces the understandings of resource nationalism and mutually constitutes them. The representatives consider that the state has the legitimate right of production and exploitation of the energy sources. This right comes from the heritage of the oil nationalisation and the mythified perception of the efforts made in order to gain control of the industry. Given this shared idea of rightful ownership, regardless of the country of origin, the private sector is considered an antagonist that would only pursue the interests of few individuals. Which according to these specific Congress factions would be against the interests of the state and the general population.

The legislators from the PRD often used historical references to the oil nationalisation and to the ex-president Lázaro Cárdenas. Given that the founder of the PRD, Cuauhtémoc Cárdenas is the son of Lázaro Cárdenas. This gives a closer relationship between the political doctrine of this party and heritage of Lázaro Cárdenas and the oil nationalisation. Public education has played an important role in the construction of the idea of a nation. Throughout the years the official idea of the nation presented on the textbooks has fluctuated according to their ideological system (Vargas, 2011). In her analysis, Vargas (2011) presents the evolution of the official idea of the nation and how it has been constructed and transmitted to the population through the free textbooks in public education. An interesting finding of this

analysis is that in the official historical narrative, they tend to magnify the historical actors, presenting them with a legendary image. As in the case of Lázaro Cárdenas and the nationalisation of oil, which is presented as a counterbalance of the foreign capital and influence. Onuf (1994; 2002; 2017) argues that the material reality is transmitted through language in social interactions, which is particularly relevant in power relations, such as the influence that teachers have on students. Thus, the education system played a key role in the reproduction of the resource nationalism discourse and the representation of historical figures such as Lázaro Cárdenas.

Continuing with the analysis, according to the factions of the Congress previously mentioned, the objective of the exploitation of energy sources is to provide cheap access to electricity, gasoline and other fossil fuels. Low energy prices would be reflected in lower food and transportation prices among others. The political factions argue that if the state maintains ownership of the energy industries the revenues of the energy sector would be directed towards social programs and services that would benefit the general population.

The discourse of these Congress factions presented elements of social class division. They argued that the energy sector should benefit the people with scarce economic resources, often describing them as the *poor families* and claiming that their faction would defend *first the poor*. These statements show a discourse of social class division but with a sense of collectivism where the poor are represented as a synonym of the nation. The representatives use a paternalistic discourse that removes the agency from the people with scarce resources and positions their political parties as their only protectors. Even when the people in the domestic private sector are a part of the Mexican population, the representatives consider them as the antagonists of the nation.

The discussion of climate change in the Congress increased considerably, this can be attributed to a higher relevance of climate change at a global level, and an increased

participation of Mexico in the international arena. In the presidential term of Felipe Calderon there were significant advances in climate change policy, particularly the enactment of the general law of climate change. However, the discursive representation of climate change continued to use technical lexicon which distances the speaker from the message. Climate change was portrayed as a problem that should be solved by the international community. Furthermore, domestic climate change policy was represented as fulfilling the obligations with international agreements. This representation is inadequate because it does not show the domestic relevance of climate change policy.

The resource nationalism discourse shows that the precedent of rejection of foreign exploitation is a building block of the national identity. Therefore, if climate change policy is perceived by the policy makers as being adapted from international norms, and is a policy that attempts to change the dynamics of the energy sector, the representatives could be reluctant to change because resource nationalism is more relevant to them. Hence, if climate change policy aims to change the energy dynamics in Mexico, it is necessary to show its domestic relevance.

The domestic relevance of climate change policy can be represented by the inclusion of the consequences of climate change in the livelihood of the people. The representatives in the Congress portrayed the effects of climate change, such as flooding, and hurricanes, in a sympathetic manner. However, the representatives addressed them as isolated events caused by climate change. In order to increase the domestic relevance of climate change policy and shift the perception of resource nationalism, it is necessary to include a representation of the effects of climate change in the energy policy discourse. This can be achieved by including the need to protect the people of the effects of climate change as a fundamental part of social justice. The resource nationalism discourse shows that social justice is a building block of the national identity. Therefore, if the protection against the effects of climate change is included

in the narrative of social justice, and the production and consumption of oil is portrayed as causing injustice, the resource nationalism discourse could change.

Conclusions

In this chapter I continued with my interpretation to the question: How was the resource nationalism discourse presented from 1994 to 2012? I discussed the sociopolitical context of the presidential term 2006 – 2012. This term started with a major challenge to the legitimacy of the presidential election of 2006, due to the close margin of difference between the two main candidates: Felipe Calderon and Andres Manuel Lopez Obrador. During the presidential term of Felipe Calderon there were many important events regarding the energy sector. Starting with the energy reform of 2008, and the enactment of the general law of climate change. I continued with the corpus analysis, where I showed examples of the resource nationalism discourse in this period of time. I followed with a critical analysis where I presented the relationship between the sociopolitical context and the discourse, I argued the resource nationalism discourse was closely linked to an antagonistic discourse related to the elections of 2006.

The achievement of the mitigation goals on the general law of climate change represent a big challenge, due to the importance of hydrocarbons in the energy matrix and the relevance of the resource nationalism discourse. Nevertheless, if the understanding of social justice includes a need to protect the people from the effects of climate change, and portrays oil as a major cause of injustice, the resource nationalism discourse could reduce its relevance. In the next chapter I analyse the resource nationalism discourse based on my analysis discussed in chapters five, six, and seven. I present the elements of the historical discourse compared to the contemporary discourse in order to understand the construction of the resource nationalism discourse, which elements have remained as part of the discourse and which elements have changed. I continue with an analysis of the resource nationalism

discourse and climate change policy. I discuss the link between the resource nationalism discourse and the energy sector in order to determine to what extent is the resource nationalism discourse posing an obstacle to climate change policy.

Chapter 8. Resource Nationalism Discourse and Climate Change Policy

The resource nationalism discourse has evolved over the years since its construction in 1938. In this research, I have explored the understandings of the representatives in the Congress throughout time, in order to provide a perspective of how the discourse has changed. In the previous chapters I discussed the elements of the historical and modern discourse. It is important to understand the perspectives in the Congress in order to identify the elements that constitute the discourse and demythify the elements that pose an obstacle for policies that aim to mitigate climate change.

The goal of this research is to provide a constructivist analysis of the relationship between the resource nationalism discourse and climate change policy. In this chapter I explain this relationship based in the analysis from the previous chapters. Through this analysis, I provide my interpretive answer to the research questions of this thesis: How does the resource nationalism discourse pose an obstacle for climate change policy in Mexico? I approach this question by answering the following subquestions:

1. How was resource nationalism in Mexico constructed and institutionalized?
2. How was the resource nationalism discourse presented from 1994 to 2012?
3. How does the discursive representation of resource nationalism conflict with the discursive representation of climate change?

The first question is going to be linked to the discussion provided in chapter five, where I presented the historical analysis of the resource nationalism discourse, and explained the legitimation process of Cárdenas' political regime. To answer the second question, I connect the elements of the discourse presented in chapters six and seven. I present the elements of the contemporary discourse from the terms of the presidents Ernesto Zedillo

1994 -2000, Vicente Fox 2000 – 2006, and Felipe Calderon 2006 – 2012 in order to illustrate the changes that have occurred in the discourse. To conclude the discussion of the resource nationalism discourse I analyse the role of the historical resource nationalism in the contemporary discourse in order to give my interpretation of how this discourse has been reconstructed throughout the years and became a part of the national identity.

In the second part of this chapter I present the relationship between the resource nationalism discourse and climate change policy. I make two distinctions to the impact of climate change policy. Firstly, I discuss the practical implications, including the use of subsidies and oil dependency. Secondly, I address the discursive implications, based in the discussion from chapters six and seven. I analyse the impact of the resource nationalism representation in climate change discourse and practice, as well as the representation and effects of the climate change representation in the Congress. I finalise this chapter with a discussion of the lessons that can be learned from the resource nationalism discourse and applied to progress climate change representation.

8.1 The construction and reconstruction of the resource nationalism discourse

In this section I provide my critique of the resource nationalism discourse. I begin by explaining the colonial precedents of the discourse and the legitimisation strategy developed by president Lázaro Cárdenas. I discuss how Cárdenas institutionalised fundamental social structures in Mexico that became part of the national identity such as, the oil nationalisation. I continue with an analysis of the reconstruction of the contemporary resource nationalism discourse. I link the historical relevance of the energy sector and the understandings of the Congress of sovereignty, state ownership and social justice. I discuss the elements of the discourse and their salience according to their prevalence in the discourse over time. In the

following section I discuss the construction of the resource nationalism discourse, to provide my interpretation to the first research question: How was resource nationalism in Mexico constructed and institutionalized?

8.1.1 The construction of resource nationalism

The construction of the resource nationalism discourse was established with the oil nationalization of 1938. It was a symbol to legitimise the sovereignty of the nation and to unite the people of Mexico. However, the oil nationalisation was not an isolated event, it was part of a strategy from president Cárdenas to legitimise his political regime in a time of instability and division.

The Mexican resource nationalism discourse has an early precedent developed in colonial times. The Mexican society has a historical precedent of exploitation by Spain. This precedent had a link with the exploitation of natural resources. Several sectors of society were discriminated and living in precarious conditions, while a foreign country was profiting from the natural resources of Mexico (Cárdenas, 2013; Svampa, 2013; Azama, and Ponce, 2014).

The system of castes in colonial Mexico, established a social structure of discrimination and exploitation, where the skin colour determined the position of an individual in society. The *indios*, and *mestizos* were perceived in a manner that deprived them of their humanity. The process of *mestizaje* eventually made the castes system obsolete. Nevertheless, this discriminatory practice left deep scars in the national identity (Chorba, 2007; Morner, 1966; Lund, 2008).

The relevance in the relationship between extractive industries and sovereignty can be found in colonial history. During the debates in the courts of Cadiz the deputies talked about the importance of mining for the progress of the state. They attributed the life of the state to

extractivism. The deputies directly linked the terms sovereignty with the extractive industries, an understanding that was further transmitted to the people in the Nueva España (Cavo, A., and Bustamante, C., 1836; Congreso de los Diputados, 1811a; 1811b).

This understanding is particularly relevant given that the speeches took place in the debates for representation of the people in the Americas. The supporters for representation argued that people who devoted their life to the extractive industries, should be given all the rights and benefits the state could provide. Therefore, people in the Americas who were in similar circumstances should be treated equally and obtain representation (Guerra, 1994; King, 1953; Cavo and Bustamante, 1836).

This understanding represents the extractive industries with three significant attributes. First, the extractive industries provide recognition of the most basic human qualities to the people who work in them, something that had been previously denied to a majority of population in colonial Mexico. Second, the extractive industries provide acknowledgement of representation beyond the territory, in the international arena. Third, the extractive industries provide the capabilities of self-determination, in other words, they provide sovereignty.

After the independence, the political instability in Mexico resulted in revolts, betrayals and struggles for power. Spain recognised the Mexican independence until 1836 (Secretaría de Relaciones Exteriores, 1927). Nevertheless, the struggles remained between political factions. Years after the independence, the US declared war on Mexico in 1846. This resulted in the loss of almost half of the Mexican territory leaving Mexico in a weak position. When Porfirio Díaz became president, the economy thrived and there was increased foreign investment. However, Díaz remained president for decades, during which the inequalities grew deeper (Bethell, 2001; Gonzales, 2002).

In 1910, several revolts around the country became a civil war. The revolution was caused by the unrest of certain sectors of society who lived in precarious conditions. The Mexican revolution was caused by dissatisfaction of many sectors of the population, due to poverty and social inequalities. The revolution was not originated as a united front; it was constituted by several revolts with diverse agendas. By the end of the revolution many factions tried to legitimise power, but the country remained divided (Krauze, 2006; Guerra, 1994; Gonzalez, 2002).

After the war, a period of stabilisation followed, where the social structures were being reconstructed. Plutarco Elias Calles founded the PNR, and became president. However, by the end of his term, Calles remained influential in the government (Bethell, 1991). When Lázaro Cárdenas became president in 1934, he implemented a strategy to legitimise his power and institutionalize his regime.

Cárdenas' reforms and policies established the fundamental social structures from contemporary Mexico. I argue that Cárdenas' strategy to institutionalise his regime had five crucial components. Firstly, the exile of Calles and isolation of his followers, as a means to cease the influence of the previous regime and prevent a later opposition of Cárdenas' regime. Alongside, Cárdenas changed the name and structure of the ruling party, creating a distance between him and Calles. The restructuration of the official party into the PRM was a strategy to replace Calles' regime into a new political regime.

Secondly, the agrarian reform, where Cárdenas gave land to the *campesinos*, which consequently, gave Cárdenas the gratitude of the *campesinos* and effectively gained a loyal set of followers. Alongside the land redistribution, Cárdenas armed the *campesinos* to defend their land from the previous owners (Tai, 1974). This created an antagonism between the *campesinos* and the previous owners. Through this action, Cárdenas directed the antagonism

of the *campesinos* towards the landowners and allied his government with a sector of the population that had the precedent of overthrowing a government during the revolution.

The third element of Cárdenas' strategy was to gain the support of the unions. Workers from diverse industries established unions with a diversity of political positions. With the establishment of the CTM, the unions were organised under one umbrella. However, the CTM was aligned to the ruling party, this means that its members supported the government in exchange for favouritism. The government established the legality of strikes, which created a dependency from the unions towards the government. Furthermore, independent unions did not benefit from this arrangement and undermined any competing unions (Snodgrass, 2003). If Cárdenas' actual intent was to support unions and deliver social justice, he could have achieved it through other methods. In the case of the CTM, CNC, and SNTE, he aligned them to the ruling party and harvested their support, while undermining any competing unions who represented an opposition.

The fourth element was socialist education and government control over the education system. The national union of education workers, later known as SNTE, functioned in a similar way as the CTM, which established an element of dependency in the education system (Bensusán, and Tapia, 2011). The political ideology of the official party was reproduced by the teachers and learned by the pupils. This started a cycle of ideology reproduction throughout the education system (Gonzalez, 2012). The teachers were integrated into the official party and they taught the students the ideals of the revolution and represented the figure of Cárdenas and the oil nationalisation from the perspective of the official discourse. These political strategies enabled the government to influence key sectors of society, which throughout the years enabled the institutionalization of the official party. With these political tactics, Cárdenas delivered a strategy to legitimise his regime.

The final element of Cárdenas' legitimisation strategy was the oil nationalisation in the energy sector. The poor working conditions of the oil workers and their general unrest presented a good opportunity to obtain a symbol that would unite the people. This symbol needed to be important for the people, in order for Cárdenas to provide them with a victory. This victory would represent Cárdenas as having the legitimate right to rule. The oil nationalisation was presented as a rejection of foreign interests. However, when analysing the political context of the time and the historical context, it is also evident that it was not only a fight against foreign interests. The significance for the people was based in the collective memory of foreign exploitation. In the colonial precedent, there was an established understanding of the relationship between, extractivism, sovereignty and recognition. Hence the extractive industries represented self-determination and recognition from foreign states. Therefore, the nationalisation of the oil industry represented a symbol of victory against foreign exploitation and consequentially, created national unity. The oil nationalisation became part of the natural order (Adler, 1997). This event institutionalised resource nationalism and gained legitimacy by claiming to fight foreign exploitation.

Assessing the mental processes of a historical figure is methodologically challenging. Nevertheless, we can interpret the actions and choices of the given figure through the analysis of the historical context and researching the discourses that became obscured. In the case of Cárdenas, the contemporary discourse represents him with an unquestionable nobility and bravery because his actions aimed to benefit, and protect the nation. However, the choices made by Cárdenas indicate a strategy to institutionalise his regime. Cárdenas' actions systematically reduced opposition and potential threats, as in the case of the CTM and Calles exile. Cárdenas established alliances, including a grateful and loyal following in the case of the *campesinos*, and a dependant one in the case of the CTM and SNTE. Through the education system, he established a system to reproduce the official discourse and his own

image. Finally, with the oil nationalisation, he obtained a victory that legitimised his right to rule.

Cárdenas created antagonistic figures for the public to focus on, the land-owners for the *campesinos*, so that they focused their resentment towards them rather than the government. As well as foreign oil companies as the enemy for the nation to defeat, and heal the historical divisions in the nation. Cárdenas government had a strong political opposition, however, their existence has been virtually erased from history.

While Cárdenas government had a strong opposition, mainly from other political groups, the corpus analysis showed that regardless of the ideology, they used structural oppositions to represent foreign interests. The supporters of Cárdenas' regime presented foreign interests of oil companies as the enemy of the state and the nation. The opposition of Cárdenas government expressed that the influence of the international communism, mainly the soviet system, was against the interests of the nation. Analysing these two perspectives, the commonality is that in both perspectives, even when they had ideological differences, they both reject the influence of foreign interest in domestic issues. The rejection against the foreign influence had its origins in colonial times, which lead to a great resentment among the population. Therefore, there is an understanding in the collective memory, that foreign means exploitation.

The corpus analysis showed three main discourses. The first was the *official discourse*, produced by Lázaro Cárdenas and government officials. The second was the *supporters discourse*, produced by public figures, academics and government officials that supported Cárdenas' government. The third was the *opposition discourse*, which was produced by groups and individuals that were contrary to Cárdenas' regime. However, this discourse has been obscured in the contemporary resource nationalism discourse. The historical resource nationalism discourse was constructed by a combination of the official and

the supporters' discourses. The speech of Lázaro Cárdenas on March 18th, 1938 when Cárdenas announced the oil nationalisation was central and the most representative piece of the corpus of the resource nationalism discourse.

The president Lázaro Cárdenas and the government officials produced the official discourse, which attempted to justify the oil nationalisation and influence the public to support the actions of the government. The main participants of the discourse are: the nation, the oil companies, and the government. The use of collectivisation and deontic modality intended to persuade the population that the society had a common goal, which was to fight against exploitation.

The use of structural oppositions presented the oil companies as the enemy of the nation, which represented foreign interests and exploitation. The government was presented as the protector of the nation, who would defend the nation from exploitation by nationalising the natural resources of the nation. The oil nationalisation was a symbol to create a sense of *sameness* and unite the people. The strategy of personification was used to give the nation human characteristics that would be easier for the public to identify with. The use of over lexicalisation and hyperbole were used to add impact to the discourse, by emphasizing the importance of fighting together for a common goal.

The elements of the supporters' discourse include the use of strategies, such as structural opposition and over lexicalisation. The supporters' discourse represents the same participants as the official discourse: the president Lázaro Cárdenas, oil companies and the nation. When referring to Lázaro Cárdenas, the supporters use over lexicalisation and adjectives referring to bravery and justice. Cárdenas is represented as a hero that would protect the people and that deserves the respect and support of the people. When referring to the oil companies, Cárdenas' supporters used structural oppositions to present an *us vs. them* relation. They present oil companies as enemies of the nation and anyone who disagrees with

the government would also be considered as an enemy of the nation. When referring to the nation, the supporters used collectivisation to present the people as a united entity that has the same goals and ideals.

As discussed in chapter five, the structure of the historical resource nationalism discourse can be summarized as follows:

- A common goal of society defines the nation. All members of society belong to a nation. All members of society have a common goal.
- Members of society have previously been subject to foreign exploitation. All members of society are against exploitation. The nation has a common goal of justice. The nation is against exploitation and the oil nationalisation is a fight to obtain justice.
- Oil companies represent foreign interests. Foreign interests represent foreign exploitation. The nation is against exploitation. Hence, oil companies are the enemy.
- The government delivers the will of the nation. The nation is against exploitation and wants justice. Oil companies represent foreign exploitation. Hence the government protects the nation from foreign exploitation and delivers justice.
- Cárdenas represents the government. The government protects the nation and delivers justice. The nation are all individuals. Cárdenas protects all individuals from foreign exploitation and delivers justice.

The choice of oil nationalisation as a central point of Cárdenas' agenda was a strategy carefully considered in order to legitimise his government and the power of the ruling party. This legitimisation strategy was based, firstly, on the assumption that public opinion would feel compelled to support oil nationalisation, given the historical background of resource exploitation. Secondly, foreign companies were presented as antagonists, which would give the people a subject to defeat and obtain symbolic justice for all the years of exploitation from foreign countries. A common goal would emphasise the similitudes of the people in a

divided society, which would create the sense of sameness needed to unite the nation. Finally, the control of the oil industry would provide recognition of the self-determination of the state in the domestic and international arenas.

The use of a resource nationalist discourse was very successful as a strategy of legitimisation of Cárdenas' regime. Successful to the extent that in the present day, the education system continues to present President Lázaro Cárdenas as a hero and the oil expropriation is still commemorated in Mexico. In this section I have presented my interpretation of the construction of the original resource nationalism discourse and in the next section I explore the reconstruction of the contemporary resource nationalism discourse and critically analyse the sociopolitical environment and the links with the historical discourse. While the essence of the resource nationalism discourse remains similar, there are certain elements that have changed, as I further explain to address the second question: How has resource nationalism been reconstructed in the contemporary political context?

8.1.2 The reconstruction of resource nationalism

In the previous section I argued that the resource nationalism discourse was originally produced as a strategy of legitimization of the political regime of Lázaro Cárdenas and the ruling party. Cárdenas used oil nationalization as a symbol of rupture with the historical foreign exploitation. President Cárdenas and the ruling party established a social structure that reached many key sectors of society, such as the unions, the *campesinos* and the education system. Given that these sectors were influenced by the government, the official party was able to reproduce the discourse and mythify Cárdenas as a hero of the nation. The discourse was reproduced throughout the years and even when the institutions evolved, the discourse still has a strong significance within the political elite. The representatives of all political parties have a great respect for the history of the oil nationalization and consider the

state control of the oil industry a main aspect of energy policy. However, within the political parties there is a spectrum of resource nationalism engagement, where the parties that have a closer relation with Cárdenas heritage, have a more traditional approach to energy policies.

In order to understand the perceptions of the contemporary resource nationalism discourse, I focused on the presidential terms of Ernesto Zedillo, Vicente Fox and Felipe Calderon. The corpus of this analysis was focused on the political debates held on the Congress regarding energy policy. The objective of the analysis of the resource nationalism discourse is to determine what the elements of the discourse are and how they have evolved over time. In order to do this, I introduced the historical resource nationalism discourse to understand the construction and origins of the discourse, in this section I present my interpretation of the contemporary discourse and how the elements of the discourse have evolved to this day.

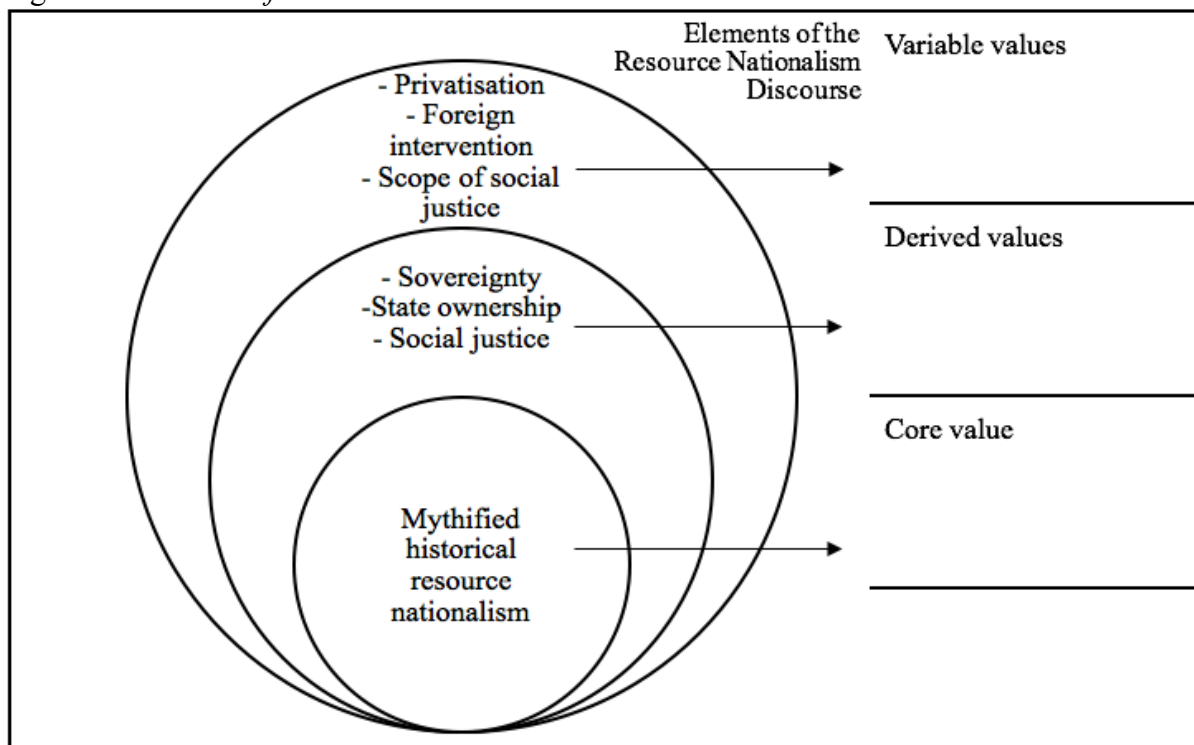
I classified the elements of the resource nationalism discourse in three categories according to their significance and variation throughout the years: core values, derived values and variable values. The core value of the discourse is the mythified historical resource nationalism. This element is the most relevant part of the discourse, it has the lowest variation in its representation and is regarded as having unquestionable veracity. This includes the figure of Lázaro Cárdenas and the oil nationalisation. In all the legislatures analysed, Cárdenas was regarded as an authoritative figure that deserves loyalty. Cárdenas is represented with magnified virtues, and adjectives such as, heroic, brave, noble, and humble. The oil nationalisation is regarded as the legacy of Cárdenas and any attempt to modify his legacy is regarded as a betrayal.

The derived values are the understandings that emanate from the historical resource nationalism. These are the elements that constitute the structure of the discourse: social justice as the purpose of resource nationalism, state ownership as the means to achieve social

justice, and sovereignty as the decision-making capability to determine how social justice will be delivered.

Finally, the variable values, which are the elements of the discourse that varied in scope and relevance throughout the years. These elements are subject to discussion in the energy debates: privatisation, foreign intervention, and the scope of social justice. Debates on privatisation relate to investment or concessions in the energy sector. Scope of social justice involve themes such as the use of subsidies to provide cheap energy or the use of oil revenues to fund social projects. Foreign intervention was originally a crucial part of the discourse but state ownership has impacted in its relevance and now it is referred to as a possible consequence of privatisation. In figure 1 I illustrate the elements of the discourse.

Figure 1. *Elements of the Resource Nationalism Discourse*



From the discourse analysis, we can see that the importance of the mythified historical resource nationalism is still a primary part of the discourse. The idealization of Lázaro Cárdenas as a hero was a result of the legitimization strategy of Cárdenas and the reproduction of his discourse throughout the years. This representation became stable over

time, and the mythified representation of the historical resource nationalism became an institutional fact (Klotz and Lynch, 2007). The resource nationalism discourse adopted significant elements from the historical resource nationalism discourse and further elements were added to the contemporary discourse. The elements shared with the historical resource nationalism were the derived values and the rejection of foreign intervention. The new elements that became fundamental to the contemporary resource nationalism discourse were the mythified perception of the historical resource nationalism and domestic private interests as a structural opposition in the discourse.

The resource nationalism discourse in the Congress has been reproduced in a wide spectrum of engagement by the parliamentary factions. The representatives from the political parties participating in the decision-making process for energy policies have different degrees of engagement with the resource nationalism discourse. Parties such as PRD and PT are the ones that have the highest engagement in the discourse. From the lexical and inter textual discourse analysis I classify the political parties in the following spectrum of engagement with the resource nationalism discourse,

Table 5. *Political parties and engagement in the resource nationalism discourse*

Engagement with the resource nationalism discourse	High	Medium	Low
Political Parties	PRD PT PSD Convergencia/Movimiento Ciudadano	PRI PVEM PANAL	PAN

The representatives of PRD, PT and Movimiento Ciudadano, have the highest level of engagement. However, all the representatives state the importance of the historical heritage and state ownership. While the focus of the policy agenda might differ, the state ownership is still a very important matter on energy policy.

The contemporary discourse of resource nationalism increased the use of concepts such as class division, sovereignty, and state ownership. The political parties that presented a higher engagement with the resource nationalism discourse argued that the oil industry should be kept within the control of the state, given that it was part of a historical heritage. The representatives often referred to Lázaro Cárdenas as a hero of the nation and expressed that it would be shameful for the nation to give away the oil industry to the private sector. This exemplifies how the representatives have reconstructed the resource nationalism discourse, and that the historical resource nationalism is still in the collective memory as part of the national identity.

The contemporary resource nationalism discourse is characterized by historical references. Regardless of the party ideology, the representatives stress the importance of the oil nationalization and Lázaro Cárdenas' legacy. However, the political parties differ on how the energy policies should be approached. The parties with a less degree of engagement on the resource nationalism discourse argue that the energy sector should focus on structural and economic efficiency. On the other side, the parties with higher engagement on the resource nationalism discourse argue that the energy sector should follow the principles that Lázaro Cárdenas first established during the oil nationalization. These principles are based on social justice, where the nation should benefit from natural resources, particularly the people with less economic resources should benefit from the profits of the energy sector. The benefits are based on strategies such as higher subsidies for energy products like gasoline and electricity, or use of oil revenues to fund social projects.

The scope of social justice is the element that creates more controversy, given that there is not an established understanding of what social justice specifically entails, the representatives use it to antagonise the government and appeal to certain sectors of the population. The understanding of the beneficiaries of social justice varied across the

legislatures. During the term of President Zedillo, the beneficiary was represented as the nation, similarly to the historic representation. In the administration of Vicente Fox, the discourse shifted towards benefiting the most vulnerable sectors of the population. The speakers increased the use of terms such as the poor, humble, and vulnerable. This trend increased during the term of Felipe Calderon, were statements such as, *in defence of the poor* or *first the poor*, where used to create a structural opposition with the government and establish an element of unfairness.

The representatives from the PRD, PT, PSD and *Movimiento Ciudadano* included class division as part of the understanding of social justice. The representatives argued that the sectors of society with less economic resources should be the first to be considered when defining the energy policies. The use of class division in the contemporary discourse was introduced in the reconstruction of the discourse. In the contemporary discourse, the private sector is presented as a structural opposition. Hence the interests of the elites represent the enemy of the nation. With the use of the strategy of collectivization in the discourse, the representatives presented the poor as a synonym for the nation and presented the private sector as the elites and antagonist of the nation.

The representatives from the parties with a higher engagement in the resource nationalism often establish a class division and represent the poor as synonym for the nation. They represent the interest of the state as the interests of the sectors of society with less income and presenting a structural opposition with the interests of the private sector. It is interesting to see that the original discourse had as a main argument a structural opposition with the foreign companies. However, as the discourse was reproduced and reconstructed, this structural opposition shifted towards the domestic private sector. This shift has been linked with the influence of foreign interests in domestic energy policy, however the main

argument has a class division basis and is related to the importance of policies to achieve social justice.

The state control over the energy sector, particularly PEMEX was one of the main issues in the Congress debates. The PRD traditionally argues in favour social welfare policies. Given that the state ownership of PEMEX represents the means to achieve social justice, the representatives of the PRD still consider the use of oil revenues in social welfare a main priority in the affairs of the state.

During the presidential term of Felipe Calderon, the most relevant debate in energy policy was the proposal of an energy reform in 2008. During this debate, the parties with stronger engagement with the resource nationalism discourse associated two elements in the discourse: foreign intervention and private ownership. This association shows that the reconstruction of the discourse included new concepts that were not relevant in the historical discourse. As I discussed earlier in this chapter, in the historical discourse the structural opposition referred to foreign interests. However, in the contemporary discourse, the structural opposition is represented by the private sector, regardless of the country of origin.

The introduction of the private sector as a structural opposition in the discourse is an element closely related to the understanding of state ownership. Given that the oil nationalization played a significant role to unite the nation, for the representatives of parties like the PRD, the state ownership of PEMEX is still an important symbol of nationalism in Mexico. State ownership represents the decision-making capabilities of the state, over the energy sector. Hence, it represents the sovereignty of the state. Sovereignty is a fundamental concept that was used in the historical discourse and continued to have a great importance in the contemporary discourse. In the lexical analysis, the representatives argued that the participation of the private sector in the oil industry would lead to foreign interests to influence domestic matters, hence breaching the sovereignty of Mexico. Furthermore, the

representatives' understanding means that the participation of the domestic private sector would reduce the decision-making capabilities of the state.

In the contemporary resource nationalism discourse, we can see a fluctuation in the references to the elements of resource nationalism. The discourse is highly influenced by the sociopolitical context. The political atmosphere from 1994 to 2012 had several events that were relevant to the resource nationalism discourse, however it is important to acknowledge that the presidential term of Felipe Calderon had more relevance regarding energy and climate change policies. The presidential terms of Ernesto Zedillo and Vicente Fox had little changes in the energy policy, and climate change was not an important issue in the political agenda.

In 1994 the president and the majority of the Congress was controlled by the official party (PRI) and the energy sector followed the traditional policies. An increasingly open market has characterized the sociopolitical context since 1994; especially since the NAFTA agreement came into force. While many sectors were open in the North American market, the oil industry was not included in the agreement (Roff et al., 2003). The presidential term of Ernesto Zedillo was the last of a seven decades uninterrupted rule of the PRI. It is important to stress that since the foundation of the PNR and its following name change to PRI, the same political party was on the power for over seventy years, until the year 2000.

In the year 2000 Vicente Fox became the first president from the National Action Party (PAN). While it was a long-expected change, the energy debate remains in a very similar situation as it was in the previous term. With this election, the political atmosphere changed when a president from an opposition party was elected. However, the majority in the Congress was still in control of the official party. In 2006 an unprecedented change took place, the presidency and the majority in the Congress was from the PAN but the PRD became the second political force, while the official party (PRI) became the third larger party

in the Congress. This change brought to the Congress two completely opposite political forces. The PAN, with a more neoliberal approach and the PRD, which in terms of energy policy had a more traditional position.

The Democratic Revolution Party (PRD), was led by Cuauhtémoc Cárdenas who inherited the ideology of Lázaro Cárdenas. The resource nationalism discourse has a stronger meaning for the representatives of this party. I argue that parties with a higher engagement in the resource nationalism discourse consider Lázaro Cárdenas as a hero and cherish his political ideology not only from a political perspective, but also at a personal level. The fact that Cuauhtémoc Cárdenas grew up and learned the political practice of Lázaro Cárdenas, is highly influential in the ideology of the party that he founded. Given that the resource nationalism discourse was a flagship from Cárdenas presidential term, the ideology of the PRD has reproduced this discourse and the representatives would have a higher engagement with resource nationalism.

In 2006 when Felipe Calderon became president, the political atmosphere was problematic given that Felipe Calderon won with a very narrow difference over the candidate Lopez Obrador from the PRD. This caused a friction that lasted the entire presidential term of Felipe Calderon. The energy debates intensified because of the political friction, showing a greater salience of the resource nationalism discourse. In 2006 the PRD had an increased influence in the Congress and considered that the attempts to reform the energy sector posed a threat to the sovereignty of the energy sector, the resource nationalism discourse became more important in the Congress debates. It is important to note that even the political parties with less engagement on the discourse and with a more pragmatic approach to energy policy such as PAN, still considered and made references to the historical importance of resource nationalism.

The energy sector has been subject of the resource nationalism discourse since the presidential term of Lázaro Cárdenas. However, it is the oil industry the one that has the greatest symbolism and importance on the discourse. In 2008, Felipe Calderon proposed an energy reform that started a passionate debate in the Congress. Representatives from the PRD, PT and other parties with a higher engagement on the resource nationalism discourse expressed their concerns over the private sector participation and the lack of focus from the original vision of Lázaro Cárdenas. This illustrates the relevance of the historical resource nationalism in the contemporary discourse.

In summary, the elements of the resource nationalism discourse can be classified into three categories: first, core value, which is the mythified understanding of the resource nationalism. The understanding in the Congress of this value remained constant and uniform throughout the legislatures analysed. Second, derived values, which are the understandings that construct the structure of the discourse: sovereignty, state ownership, and social justice. Finally, variable values, which are the understandings that have varied over time and present the issues to debate in the Congress such as, the scope of social justice.

The political parties have different levels of engagement with resource nationalism discourse, where the PRD shows the highest engagement, and PAN the lowest engagement. Nevertheless, all political parties show adherence to the understanding of unquestionable veracity of the mythified historical resource nationalism.

The reconstruction of the discourse in the contemporary political context shows that while foreign interests still represent a structural opposition in the discourse, the private sector has become the main antagonist. This can be explained on the importance of state ownership as a symbol of national unity and historical heritage of the oil nationalization. In the following section I present the relationship between the resource nationalism discourse

and climate change policy, in order to address the final research question: How does the resource nationalism discourse pose an obstacle for climate change policy in Mexico?

8.3 Resource nationalism discourse and climate change

In the previous sections I discussed the construction and reconstruction of the resource nationalism discourse, I explored the understandings of the Congress and identified the elements of the discourse. I examined how the discourse has changed throughout time and how the contemporary discourse has its foundations in the mythified historical resource nationalism. In this section I discuss how the resource nationalism discourse impacts climate change policies. In order to do so, I explore two paths of impact: practical implications and discursive implications. In the practical implications, I address oil dependency, state ownership, and the scope of social justice. In the discursive implications, I analyse the representation of the discourses. I assess the discourses and illustrate how they represent competing norms: resource nationalism was domestically originated and climate change representation was adapted from foreign norms. In the following section I explore the practical implications of the climate change discourse.

8.3.1 Practical implications

In this section I present a discussion of how the resource nationalism discourse can have an impact on climate change policies. As I previously discussed, the resource nationalism discourse has been reconstructed throughout the years and some elements have changed in the process. Within the Congress there is a spectrum of engagement with the resource nationalism discourse and the parties with a link to Cárdenas heritage embrace the discourse more deeply.

In the contemporary discourse, we can see that the main structural opposition has become the private sector and the main goal of resource nationalism is to use the profits from the energy sector to benefit society. The main issue that they raised in the energy debates is the state ownership from the oil company PEMEX. The representatives argued that a change in the traditional policies could lead to the influence of private interests in the domestic policies. Huizar (2015) argues that the PEMEX has survived privatisation due to the economic dependency on oil revenues. While oil dependency is a relevant economic aspect in the continuous state control over the energy sector, state ownership represents more than a monetary value, it is a symbol of nationalism and part of the national identity.

Within the elements of the contemporary resource nationalism discourse, I identified the understandings that can negatively impact climate change policies. These concepts are closely intertwined, they include: oil dependency, scope of social justice, state ownership, and antagonism with the private sector. However, the impact of these concepts is relative to the amount of political influence from the parties with a higher engagement on the resource nationalism discourse.

The general law of climate change established several goals in order to switch to a low emissions economy. The general law of climate change defines a strategy and mechanisms to reduce the emissions. The goals are divided into two main areas, adaptation and mitigation. In the adaptation area, the goals are to reduce the vulnerability of certain sectors to climate change, to conserve ecosystems, and the services they provide. The goals on the mitigation section are the ones that can be impacted by the resource nationalism discourse, the main goals are to expedite the energy transition towards clean energy sources and to reduce energy intensity through mechanisms of efficiency, among others.

Veysey et al. (2015) present an analysis of the pathways to achieve the goals of mitigation on climate change policy. In their analysis, they argue that a carbon free electricity

supply and the reduction of oil as a main energy product would play an essential role in the achievement of the mitigation goals. An energy mix that includes nuclear power would be more beneficial, however it would be more difficult for the public to approve (Santoyo-Castelazo, et al., 2014). The optimal mix to produce energy is based on biomass, wind, and solar power (Vidal-Amaro, et al., 2015). According to this it is necessary to invest in the development of technology to decarbonize the energy industry (Huacuz, 2005; García et al, 2015).

The dependency of the government on oil revenues, is the biggest obstacle for climate change policies. By relying on the income obtained from heavy taxation of PEMEX, the government has an incentive to maintain the *status quo* in the production and consumption of fossil fuels. The taxation of the energy sector, especially of PEMEX, places a great burden on the company's potential for improvement and innovation. The lack of available income in PEMEX makes it particularly difficult to implement strategies to increase its efficiency and decarbonise its processes.

In order to reduce the greenhouse gases emissions of the energy sector, particularly in the oil sector, PEMEX needs to invest on modernize its operative machinery and invest in new technology. As a state enterprise, it is difficult to achieve the efficiency levels of a private industry. However, when referring to private contracts, the representatives that have a higher engagement on the resource nationalism discourse stress their concern over the *greed of economic elites* (Arvizu Rivas, 2008), and how the contracts would benefit private interests (Batres Guadarrama, 2008).

Aguilera, et al. (2014) argue that opening the oil industry to private investment is a threat to the sovereignty of the nation and that the arguments in favour of private investment are based on a neoliberal doctrine. They state that private investment would not increase the efficiency of the oil company, PEMEX. The representatives with a higher engagement with

the resource nationalism discourse presented similar arguments during the energy debates. Wolf (2009) presents an analysis of performance and efficiency of state oil companies and private oil companies around the world from 1987 – 2006, the results of this regression analysis shows that in economic terms of efficiency and profitability, private owned companies out-perform state companies. Arocena and Oliveros (2012) share similar results on a study on the efficiency of Spanish oil companies before and after privatisation, where after the privatisation the oil companies increased their efficiency. Pollitt (2008) found similar results in his analysis of the electricity sector on the Netherlands.

The arguments used by the representatives in favour of state ownership are mostly based on the benefits of using the profits from the energy sector in the provision of social programs. Shleifer (1998) calls this a *benevolent state* in his analysis. Shleifer argues that even when achieving social goals, private ownership presents a viable alternative through regulation of contracts. However, the perception of the private sector as the antagonist of the nation reduces the alternatives for investment in the energy sector.

Traditional energy policies, based on the ideals of Cárdenas are similar to the energy policies of Venezuela (Isbell, 2007). The energy sector would be controlled by the state and the profits would be spent on programs for social welfare. The unions in the energy sector would have greater influence in companies such as PEMEX and CFE, which would have a greater economic burden in the state companies. The overall efficiency in the energy companies would be affected by less investment to modernize the energy industry and promote efficiency given that the energy resources are seen as property of the nation, which should be exploited in order to benefit the people.

The historical importance of the oil nationalization has an impact on the energy sector by continuing a traditional approach to energy policy. The discourse can influence climate change policies in several aspects, starting from the intense use of oil as a main energy

product. As the main objective in the general law of climate change is to expedite the energy transition, I argue that the political parties with a more traditional approach to energy policy would continue with an intense use and production of fossil fuels. Hence, reducing the investment on clean energy production and hindering the energy transition. Parties with a higher engagement on the resource nationalism discourse consider social justice a priority, which should be delivered with oil revenues. This positions the strategies to deliver social justice, such as subsidies, and use of oil revenues in social programs as being more important than the compliance with climate change policies.

8.3.2 Discursive implications

The discursive understandings of the representatives in the Congress are fundamental in policy development. Issues regarded as relevant or urgent are more likely to be discussed, analysed, and solved than issues that appear irrelevant and distant. Hence, the comprehension of the perceptions and understandings of the political elites is crucial to analysing their impact in policy.

The resource nationalism and climate change discourses are two seemingly opposing understandings. The resource nationalism discourse was domestically originated early in the twentieth century and it was constructed with a foundation in the collective memory of foreign exploitation. The discourse was then reproduced and reconstructed throughout the years, gaining more legitimacy and relevance as part of the national identity. In contrast, the climate change discourse originated in the efforts of the international community to solve a complex global problem. The discourse only gained relevance in the last decades, but it is still perceived as an issue that should be addressed at an international level.

The resource nationalism discourse is based in the understanding that the objective of the energy sector is to achieve social justice in the nation. The traditional strategies to achieve

social justice include the use of oil revenues to deliver social programs, and the use of subsidies to provide cheap energy prices, including cheap fossil fuels. These strategies are perceived as a legacy from the mythified historical resource nationalist actions. Over time, these practices in the energy sector became a tradition and are regarded as part of the national identity. Therefore, any changes to this approach are highly contested and considered a betrayal to the core values of the nation. This understanding fails to acknowledge that state ownership of the energy sector and the continued traditional practices make the government directly responsible for the emissions of greenhouse gases and its contribution to climate change.

With the systematic study of climate change, it was clear that energy policies such as subsidies furthered the consumption of fossil fuels and intensifies climate change. However, the understanding of climate change in the Congress was regarded as an issue for the international community to address, creating a distance from domestic policies and aiming to overlook the government's responsibility in the emissions of greenhouse gases. The perception of the Congress that links the understanding of the *foreign* with exploitation, creates an *us vs. them* relationship. This understanding impacts the relevance of the climate change representation.

The representation of climate change faces two discursive obstacles. First, climate change mitigation is presented as an opposite to traditional strategies of delivering social justice through the energy sector. Second, climate change norms are represented as a need to comply with international norms, which relates to a forced intervention in domestic policies. This brings us to the understanding of sovereignty. In the resource nationalism discourse, foreign intervention is regarded as the structural opposition of the energy sector. Foreign intervention represents a threat to the decision-making capabilities of the state in the energy sector. Therefore, climate change representation implies an intervention in the energy sector,

originated from international norms, thus conflicting with the resource nationalist values of the representatives.

While the representatives understand the importance of climate change and acknowledge the necessity to take action, climate change conflict with their underlying understanding of a core value in the national identity. Thus, this conflict reduces the relevance of climate change as an issue to address at a domestic level. A significant part of the conflict relies on the understanding of social justice. Social justice is understood from an economic perspective, which includes the reduction of energy prices and use of oil revenues for social welfare programs. Climate change is not integrated into the understanding of social justice, it is represented as a technical matter that does not show the impact in the livelihood of the people.

The representation of climate change is often technical, generalised and reliant on statistics, which creates distance from the issue. In contrast, the resource nationalism discourse is presented as heroic, as a historical legacy, and a part of a national identity that first and foremost prioritises social justice. This representation does not show the reality of the energy policy, but rather an idealised image originated in the social construction of modern Mexico. The historical construction and reconstruction of resource nationalism, makes it a challenging understanding to change. However, the integration of climate change in the Congressional understanding of social justice could increase the relevance of climate change mitigation in the energy sector. To conclude this chapter, in the following section I present a discussion of the strategies from the resource nationalism discourse that can be applied to the climate change discourse.

8.3.3 Discursive devise of the climate change discourse

In this section I explore the discursive strategies that can be applied to climate change and environmental representation. The cyclical nature of resource nationalism (Stevens, 2008; Joffe et al., 2009; Vivoda 2008) can be attributed to the prevalence of the values established during colonialism. These values consider natural resources as commodities which determine the value of a nation. Neo-extractivism is characterised by an increased involvement of the state in the management of resources and discourses of nationalism, sovereignty, and legitimacy (Burchardt and Dietz, 2014; Brand, et al., 2016; Gudynas, 2014; 2016c). I argue that neo-extractivism discourses aim to solve historical injustices of recognition through redistributive means. However, this creates a tension between means and objectives.

Injustice of recognition is not only harmful because of the behaviour itself, it is harmful because it impairs an individual's ability to develop a positive sense of identity acquired through intersubjective means (Honneth, 1992). I argue that this notion can also be applied to the shared imaginary. It can provide an interpretation of how colonialism impaired Latin American countries from developing their own positive sense of identity.

The historical impairment of Latin American countries to develop their own positive shared identities caused a need to remedying injustice of recognition. Fraser (1995) argues that the solution for cultural injustice relies in cultural change. This can be achieved by reassessing the valuation system of the nation, particularly establishing a positive value of mistreated groups and their identities. She distinguishes affirmative and transformative remedies, where affirmative remedies aim to fix inequities without changing social structures. Transformative remedies aim to restructure the underlying roots of inequality and produce a shared sense of belonging.

One of the main critiques of neo-extractivism is the tensions between the economic value of extractivism as means of development versus its social and environmental impact (Burchardt and Dietz, 2014; Ruckert et al., 2017; Veltmeyer, 2012; Gudynas, 2012; 2014; 2016a; 2016c; 2017). I argue that at the core of this contradiction are three damaging ideas that postcolonial states perpetuated since colonial times. The first and most damaging idea is the perception of the environment as a commodity. A transformative remedy would be a change in the valuation of the environment. Ecosystems provide services that cannot be reproduced once they are gone. This makes ecosystems invaluable in monetary terms. Nations need to change the idea that ecosystems are a set of objects to be exploited. They need to reframe their understanding of ecosystems towards valuing the uniqueness of the national territory, as well as understanding the services ecosystems provide. States need to reframe its relationship with the environment and the perception of ecosystem as a set of objects to be exploited towards the ecosystem as a unique arrangement of elements necessary to sustain life.

The second damaging idea is the redistribution of the *spoils* of extractivism to remedy historical and contemporary injustice. Redistribution as means of addressing injustice of recognition creates a conflict because the roots of the injustice are not tackled. Recognition is in essence ideational. Postcolonial states gained sovereignty through independence, which can be interpreted as an affirmative remedy of injustice. However, the impairment to develop a positive understanding of their own shared identity created by colonialism was not addressed. Therefore, I argue that if Latin American countries aim to develop a transformative remedy to the historical and contemporary injustices they need to reassess their valuation system and development model.

The third damaging idea is the valuation of the nation in relation to their abilities to produce commodities. This is an area that opens the possibilities of changing the positioning

of postcolonial states in the global order. If states reassess the value of ecosystems as a unique arrangement of nature in the national territory, they can invest in creating new means of development. Particularly in areas where there is already a global demand, such as renewable energies. An environmentally focused model of development would represent a transformative remedy with the potential to address injustice of recognition. It would change the underlying valuation system and simultaneously build a pillar of a positive shared identity.

Climate change is understood as an issue that should be addressed by the international community, therefore it needs to increase its domestic relevance. In chapter six, I presented example of environmental representation, including the contamination of a thermoelectric plant and the adverse effects of the hurricanes from 2005. These example shows some of the elements that need to be present in the climate change discourse. First it is important to assess the effects of climate change through specific issues, rather than a collection of complex issues. For example, addressing drought or the rise of sea level in a specific location rather than generalising the events. The discourse should answer the following questions:

1. Who is going to be affected?
2. What do they do for a living?
3. What is their livelihood like?
4. How is their livelihood going to be disrupted?
5. What is the government going to do to protect them?

By answering these questions, the discourse would specify the victims of climate change, and provide closeness by describing familiar activities. The discourse should also provide legitimacy to the issue, by implying the right for the people to continue with their activities without being disrupted. Finally, the discourse should assign the responsibility of the

government to deliver social justice. Thus, integrating climate change in the understanding of social justice.

The climate change discourse needs to move away from the understanding that the goal of climate change policies is to comply with international norms. In order to do this, it needs to include the elements of nationalism that have already been internalised by the people: sovereignty, and the nation. Climate change needs to be represented as a threat to the decision-making capabilities of the state; this can be achieved by addressing its effects in economic activities such as, tourism, and the fishing industry. The relevance of the discourse can be increased by referring to the direct beneficiaries of the government's actions, such as the jobs created by increasing the production of renewable energy. Lastly, it is necessary to refer to the causes of climate change with familiar terms such as, petrol or gas instead of using terms that create a distance of the discourse, such as fossil fuels.

Conclusions

In this chapter I presented my interpretation of the resource nationalism discourse. Starting with the historical construction of resource nationalism by placing the earliest precedent on the resource exploitation during the colony of Mexico. This precedent became part of the collective memory and I argued that the history of exploitation in Mexico was key to the success of Cárdenas' oil nationalization, giving him a symbol that the people would relate to. I argued that the use of this symbol was part of a strategy of legitimization that allowed his political faction to stay in power.

In order to institutionalize the new political regime, represented by the PRM, it was necessary to gain the support of the unions, the *campesinos*, and the education workers. Hence these sectors were also integrated into the official party, to assure future support and

the construction of new social structures. In order to legitimise the new political regime Cárdenas also needed to unite the nation, which was clearly divided. Cárdenas needed a symbol of victory that would emphasise the sense of sameness in the people. The oil industry presented an opportunity to unite the nation and legitimise the new political regime. Through the nationalisation of the oil companies, Cárdenas would give the nation a reason to be united in the victory against foreign exploitation.

With these elements Cárdenas institutionalized a new political regime and constructed a shared idea of national unity. The symbolic victory became part of the collective memory and the national identity. Through the education system and other institutions, the shared idea of national unity has been constructed and reconstructed throughout the years. The oil nationalisation represented the protection of the nation against foreign exploitation. Hence in order to protect the nation, the national treasure must be protected; in this case, the national treasure is oil. The shared idea of protection of oil has been reconstructed throughout the years, creating a historical heritage of resource nationalism.

After the legitimization of Cárdenas power, resource nationalism was institutionalized by the construction of structures that shared the political ideology of the official party, such as the education system, the federal unions, and other organized groups that reproduced the resource nationalism discourse throughout the years.

After the historical interpretation, I presented the contemporary analysis where I argued that the discourse has evolved by changing the main structural opposition from the foreign companies to the private sector. While foreign influence in domestic policies is still a concern in the resource nationalism discourse, private interests pose a bigger threat to the energy sector, according to the representatives of political parties with a higher engagement on the discourse.

I argued that the main elements of the resource nationalism discourse that would have a greater impact in climate change policies are oil dependency, and the scope and understanding of social justice. The impact on social justice is reflected in the use of subsidies or social welfare policies funded by oil revenues. The understanding in the Congress of social justice as the main objective of the energy sector, is one of the discursive obstacles of the climate change discourse. In order to increase the impact of the climate change discourse, it is necessary to include climate change mitigation as an element of social justice and to change the valuation system of the state-nature relationship. To finalise this thesis, in the conclusions I summarise the main points of the thesis, explain the limitations and present an agenda for further research.

Conclusions

The findings of this thesis represent an original contribution to the literature of neo-extractivism and post-neoliberalism in Latin America. Mexico is a unique case in Latin America, while the political and economic approach followed increasingly neoliberal policies from 1994 to 2012, the energy sector retained similar characteristics to those in post-neoliberal states. Neo-extractivism is characterised by discourses of nationalism, sovereignty, and legitimacy, as well as an increased involvement of the state in the management of natural resources (Burchardt and Dietz, 2014; Brand, et al., 2016; Gudynas, 2014; 2016c). While this was a change from previous policies in post-neoliberal states, the Mexican energy sector showed a continuity of those characteristics since the oil expropriation in 1938.

In this thesis, I gave a comprehensive case study of one of the main critiques of neo-extractivism. I explored the conflict between extractivism as means of development and its environmental impact (Burchardt and Dietz, 2014; Ruckert et al., 2017; Veltmeyer, 2012; Gudynas, 2012; 2014; 2016a; 2016c; 2017). While this critique is pointed out in the literature, this thesis constitutes an addition to the understanding of how discursive practices of resource exploitation hinder climate change mitigation. Given the variegated forms of neo-extractivism in Latin America, extractivist practices cannot be generalised. In order to understand the dynamics of neo extractivism we need to analyse extractivist states in a case by case basis from ideational, economic, and environmental perspectives.

With this research, I provided an in-depth interpretation of resource nationalism in Mexico from an ideational perspective. While I acknowledge the economic aspects of resource nationalism, previous research has explored the economic motivations and implications of resource nationalism (Vivoda, 2008; Click and Weiner, 2009; Joffe et al. 2009; Mares, 2010; Wilson, 2015; Kaup and Gellert, 2017; Li and Adachi, 2017; Arbatli,

2018). Therefore, I focused my research on the ideational aspects of resource nationalism. I gave my interpretative answer to the question: How does the resource nationalism discourse pose an obstacle for climate change policy in Mexico? I have successfully achieved this by using the discourse historical approach of critical discourse analysis alongside a constructivist theoretical framework. Resource nationalism and climate change are both complex matters, therefore I established three objectives in order to provide a well-rounded answer to the main question. I focused on the understanding of:

1. How was resource nationalism in Mexico constructed and institutionalized?
2. How was the resource nationalism discourse presented from 1994 to 2012?
3. How does the discursive representation of resource nationalism conflict with the discursive representation of climate change?

The outcome of this research is reflected in my original contributions. Firstly, I analysed the construction and evolution of the resource nationalism discourse from a constructivist perspective. Secondly, I interpreted the impact of the resource nationalism discourse on climate change policy.

Childs and Hearn (2017) argue that the literature analysing the development narrative of neo-extractivism overlooks the process of how legitimisation occurs and the mutually constitutive dynamics of language and culture. The addition of analysis of political language and elements of culture can strengthen the literature on neo-extractivism. This research contributes to fill this gap by providing an in-depth analysis of the discourse that constructed legitimacy over resource exploitation in Mexico. The links between the discourse and its historical and socio-political context illustrates the dynamics of how the resource nationalism discourse came to be. As a result of my analysis, I classified the elements of the resource nationalism discourse in three categories: core value, derived values, and variable values. The core value of the discourse is the mythified representation of the historical resource

nationalism; this element is present in all the legislatures analysed and has minimal variation. The representation in the discourse establishes President Cárdenas and the oil nationalisation with magnified characteristics. The discourse is understood as being a legitimate representation of the past and having unquestionable veracity. The figure of Cárdenas is represented as deserving loyalty and any modification to his legacy in the energy sector represents a betrayal to the nation.

The derived values are the understandings that emanate from the mythified historical resource nationalism and represent the basic structure of the discourse. The elements are: sovereignty, state ownership and social justice. Sovereignty is understood in the Congress as the decision-making capabilities of the state regarding the energy sector. This understanding is placed in structural opposition with privatisation and foreign intervention. State ownership is understood as the means to deliver social justice to the nation, which is the main goal in the resource nationalism discourse.

The resource nationalism discourse is understood as the use of energy resources to achieve social justice for the nation. However, there is a tension in the understanding of social justice. While the discourse uses a redistributive approach to achieve social justice, there is an unsolved issue of recognition inherited from colonial times. The imposition of a set of values during colonialism established the value of the nation as its capabilities to produce commodities. Hence, the control of the oil industry represented control over the value of the nation. The colonialist set of values alongside the lack of recognition of a majority of the population impaired the nation's capabilities to develop its own positive sense of identity. The representatives perceive that social justice can only be achieved through state ownership, which gives the state the decision-making capabilities over energy resources. However, in this case the ideational essence of injustice has not been successfully addressed

through redistributive means. Therefore, there needs to be a cultural change to address the generational social injustice.

The discourse is highly relevant to the national identity, given that the legitimization strategy of Cárdenas, including the oil nationalisation, established the social structures of modern Mexico. Therefore, the state ownership of the energy sector is regarded as a legacy from the construction of modern Mexico. Koch and Perreault (2018) identified a strong line of inquiry between resource extraction and identity politics. However, there is little literature addressing this question. This thesis contributes a case of study within this line of inquiry by analysing resource nationalism as an element of the construction of a national identity.

From a constructivist perspective, it is important to understand the building blocks of the social reality; by uncovering the structure of the discourse we can better understand the behaviour of policy makers. In this contribution, I have analysed the resource nationalism discourse and provided my interpretation of its construction and reproduction by the political elites. Onuf (1994, 2002) argues that social norms are reproduced through language, therefore it is important to analyse the lexical choices of decision makers. This leads to my second contribution to knowledge: the impact of resource nationalism on climate change policy. In this contribution, I provide a case of study on the discursive aspects of one of the main critiques in neo-extractivism literature: the exploitation of natural resources to provide social development without addressing its environmental impacts (Burchardt and Dietz, 2014; Ruckert et al., 2017; Veltmeyer, 2012; Gudynas, 2012; 2014; 2016a; 2016c; 2017).

I categorised the impact of the resource nationalism discourse in practical implications and discursive implications. The practical implications include the state dependency on oil revenues, an antagonism with the private sector, and the reluctance to change energy dynamics. The dependency on oil is related to the perception that oil revenues should be used to achieve social justice. However, this approach neglects to acknowledge the

negative impact that climate change has on social justice, which makes the production and consumption of fossil fuels a cause of injustice. The antagonism with the energy sector closes the door to investment, even in renewable energies. The inefficient productive processes of PEMEX contribute to the generation of greenhouse gases. The state-owned company lacks investment to make its processes more efficient and the resource nationalism discourse limits the alternatives to decarbonise PEMEX's processes. The resource nationalism discourse is an obstacle to change energy policy, particularly because the historical relevance of the energy sector generates resistance to change the structure of the sector.

The discursive implications of the resource nationalism discourse on climate change policy relate to the reluctance of the policy makers to acknowledge that through the continued traditional practices in the energy sector, the state is directly contributing to climate change. Given that the production and consumption of oil and other fossil fuels are a cause of climate change, the state ownership of the means of energy production makes the government responsible for shifting the energy matrix towards renewable energy. However, policy makers represent climate change as an issue that should be addressed by the international community or shift the focus towards education to place the responsibility on individuals.

The representation of climate change plays a key role in the development and implementation of ambitious climate change policy. The resource nationalism discourse was established as a building block of the modern Mexican political system. Therefore, any challenge to the traditional energy policies is perceived as a challenge to the political system, which creates a resistance to change. The lack of inclusion of the negative impact of climate change on social justice, gives a misrepresentation of the state when the policy makers imply that oil should be used to achieve social justice. Oil is negatively impacting social justice, and through the impact on climate change, policy makers that reproduce the resource nationalism

discourse and promote traditional energy practices are prioritising short-term economic benefits at the cost of long-term sustainability.

The discourse historical approach of critical discourse analysis was a useful methodology to analyse the impact of the traditional reproduction of resource nationalism on the pragmatic necessity of climate change policy. Language is used to mutually constitute agents and structures. Therefore, it is of particular importance to have an adequate methodology to analyse language in order to uncover the components of social structures. With this study, I aim to provide an understanding on how politicians communicate on matters that are highly relevant to the population, which are energy policy and climate change. It is particularly important to analyse the language of policy makers because it is them who take important decisions that affect the entire population.

To continue, I summarise the main points addressed in this thesis. In the first chapter, I discussed the fundamentals of this thesis. I established the research problem, its significance, and the research question: How does the resource nationalism discourse pose an obstacle for climate change policy in Mexico? In order to answer this question, I addressed the following sub-questions: How was resource nationalism in Mexico constructed and institutionalized? How was the resource nationalism discourse presented from 1994 to 2012? How does the discursive representation of resource nationalism conflict with the discursive representation of climate change? I established my original contributions as a constructivist analysis of resource nationalism in Mexico, and the impact of the resource nationalism discourse in climate change policy. I described my argument to approach the research questions and the structure of the thesis.

In the second chapter I discussed the theoretical framework of constructivism, and my decision to use this theory for the analysis of resource nationalism. I continued with a conceptual framework that explored the academic understandings of national identity,

sovereignty and resource nationalism. In chapter three I described the methodology used to conduct this research. I examined the discourse historical approach in critical discourse analysis and continued with a description of the process that I conducted to analyse the research questions.

In chapter four, I provided a literature review of resource nationalism, to establish how this research fits into the wider literature. I also explored the energy sector in Mexico and provided a context of resource nationalism and climate change policy. In the fifth chapter I discussed the historical construction of resource nationalism. I explored the colonial precedents of the relationship between sovereignty and extractivism, and continued with Cárdenas' legitimisation strategy that resulted in the contemporary mythification of resource nationalism.

In chapter six I presented an analysis of the Congressional resource nationalism discourse from 1994 to 2006. I explored the elements of resource nationalism such as, the mythification of Lázaro Cárdenas and the oil nationalisation, and the understandings of sovereignty and state ownership in the Congress. I analysed the environmental and climate change representation. After the analysis of these elements I provided my interpretation of the resource nationalism discourse in this period of time. In a similar structure to chapter six, in chapter seven I explored the resource nationalism discourse and climate change representation from the years 2000 to 2006.

I finalised the analysis in chapter eight, where I presented an interpretative answer to the research questions. I established the links between the construction and reconstruction of the resource nationalism discourse. I classified the elements of the discourse according to their relevance and prevalence over time. I concluded with an analysis of the impact of the resource nationalism discourse in climate change representation as well as, the discursive

strategies that can be applied to the climate change discourse in order to increase its relevance.

The findings of this thesis can guide the discursive representation of climate change and demythify the resource nationalism discourse in order to facilitate change towards more environmentally sustainable energy dynamics. The scope of this research was focused on the historical construction of the resource nationalism discourse during the presidential term of Lázaro Cárdenas, and its reconstruction from 1994 to 2012. The choice of this time frame is due to the relevance of the climate change discourse in the last decades. It is important to note that the energy sector has changed from the year 2012 onwards, and this is an area that can be examined in further research.

During the presidential term of Enrique Peña Nieto, there was a move towards neoliberal policies in the energy sector. While the sector slightly opened towards private participation in certain areas, the resource nationalism discourse was present in political parties who previously were vocal about it. The changes in the energy sector pointed towards a move in the form of resource nationalism towards an economic approach. While the impact on climate change policy would have probably remained due to the dependency on oil revenues, the ideational perspective might have been more flexible regarding a change towards a more sustainable model. It would be useful to assess in further research the extent of change in the resource nationalism discourse. After the move towards a more open energy sector, the election of Andrés Manuel López Obrador might bring a return of resource nationalism. This assumption is based on the elements of the discourse discussed on the contemporary resource nationalism discourse. Both of these presidential terms constitute further avenues of research.

The literature on neo-extractivism would benefit from more case studies that have an in-depth analysis on the role of natural resources in the construction of a national identity.

This analytical framework can be applied to other countries that present resource nationalist policies. Resource nationalism is context-specific therefore it is important to understand the variables of each country. The discourse historical approach of critical discourse analysis used with a constructivist framework can provide the tools to analyse the building blocks of resource nationalism in other countries. It is important to continue analysis of the discursive representations of resource nationalism and climate change as a path to increase the relevance of the climate change discourse and therefore advance the governmental efforts in climate change mitigation.

The analysis presented in this thesis can be expanded to identify other obstacles for the implementation of climate change policy. Another line of investigation could address the analysis of the extent state ownership exacerbates climate change in comparison to private ownership. Furthermore, the theoretical and methodological basis of this analysis can be applied to understand the relationship and impact between two given issues: a traditional one and a pragmatic one.

The limitations of this study relating to the time frames include the exclusion of the later government of Peña Nieto and the changes in the energy sector during this presidential term. In terms of the time frames analysed, there was a limitation in the use of obscure historical discourses, such as the opposition to Cardenas' government discourse. While there was enough material from archive compilations that provided information to understand the context, the majority of the texts were in line with the official history. In terms of the actors addressed in this thesis, this study does not assess the discursive approach of international actors on influencing domestic energy and climate change policy. While this issue was out of the scope of this study, it would have been interesting to assess the level of engagement from other states, international organisations, and corporations in domestic policy. A methodological limitation was the translation of quotes without losing the nuance of the

speech. To overcome this limitation, I provided the context for the quote and translated them as closely as possible from the original speeches.

We are currently living in a very turbulent political environment, but we cannot lose sight of the most relevant and threatening issue of all: climate change. We need to continue working towards climate change mitigation to the full extent of our capabilities; because in the natural world we are all equally vulnerable, regardless of the constructions that we build in our minds.

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Annex 1. Lexical strategies

Lexical fields		Lexical fields are areas of salience in the discourse. A lexical field presents a purpose or an underlying belief that is not explicit in the text.
Lexical choices	Suppression or lexical absence	A lexical absence is the lack of representation of an area that is relevant to address in the discourse.
	Word connotation	Word connotation refers to the predominance of certain words within a framework of reference. The choice of words creates a specific meaning related to the reference framework, which would be different if synonyms or similar words were used instead. The author might want to conceal responsibility, generate a certain emotion in the reader (outrage, compassion, etc.) or present the self in a particular way, among others.
	Overlexicalisation	This strategy presents an over use of terms that are closely related or are repetitive, it can also be defined as overly descriptive. The use of

		Overlexicalization aims to persuade the reader and is often a sign of a conflicted area.
	Structural oppositions	Structural oppositions present two opposing concepts with an evaluation of them. In this strategy, it is possible to discuss only one concept and establish the remaining concept through the reference framework. This can be used to differentiate the "we" from the "others"
	Genre of communication	Lexical choices provide a genre of communication that can range from casual, informal, or authoritative among others. Specialist words or references to the law can give the author an authoritative voice, while everyday terms make the discourse casual. The juxtaposition of different genres indicates the purpose of a discourse.
Quoting verbs		Quoting verbs refers to how the author presents certain speeches and speakers, which lead the reader to make evaluations. Certain lexical choices can presuppose authority and legitimacy or assume a certain emotion from the speaker, among others. Through the use of quoting verbs, the author might persuade the reader to feel closer or further away from the

		speaker.
	Neutral structuring verbs	This strategy represents the speaker without giving an evaluation. Using neutral structuring verbs can also create distance between the reader and the speaker.
	Metapositional verbs	Metapositional verbs can be found when the author provides its interpretation of the speaker. With this strategy, we can understand how the author wants to present a speaker.
	Metalinguistic verbs	This strategy is used to describe the language the speaker used. For example: quote, narrate.
	Descriptive verbs	This strategy describes the attitude and manner of the speaker. For example: whispered or cried.
	Transcript verbs	Transcript verbs show the flow of the discourse. For example: added, pause or repeated.
Representing people		There is no neutrality when representing people, given that all terms have a connotation. With this strategy, the author can create a sense of otherness or part of the group.
	Personalisation / Impersonalisation	Referring to a specific person can directly assign responsibility, while talking about an institution / nation conceals responsibility and

		creates a higher weight of the statement.
	Individualisation / Collectivisation	Individualisation brings the subjects closer to the reader, it humanizes them. On the other side collectivisation makes the subject part of a generic group. It is important to understand which subjects are referred to as individuals or as part of a collective.
	Specification / genericisation	Individuals can be represented by name or as by a generic characteristic, such as nationality or religion.
	Nomination / functionalisation	Naming individuals in a discourse makes it is more personal, while describing them by their function can have different effects. For example, the president, highlights authority, while the defendant, dehumanizes the individual.
	Honorifics	The use of functional honorifics, such as, president or minister, increases the authority of the statement.
	Objectivation	Objectivation represents individuals by a feature. This strategy reduces the individual to a single aspect the self.
	Anonymization	Anonymization avoids specification and can show an unequal representation of the

		participants.
	Aggregation	Individuals are used as statistics.
	Pronoun vs. noun (us vs. them)	This strategy can be used to align the reader with a specific set of ideas. For example, an idea can be aligned to the ideal of the collective, while presenting the <i>others</i> who are against <i>us</i> , in a negative light.
	Suppression	When a relevant factor is suppressed from a discourse its meaning changes.
Representing actions		Similarly, to the discursive strategies that represent people, strategies that represent actions influence the reader's evaluation of a participant's actions or inactions. The analysis of representation of actions include participants, processes (agency and action) and circumstances.
	Material processes	Material processes are specific actions. Participants can be can be represented as beneficiaries of a process, actors with agency, or goals.
	Mental processes	Mental processes represent te state of mind and feelings of the participants and includes: cognition, affection and perception. The representation of a mental process can be used

		to move the attention from the action towards the emotion.
	Behavioural processes	Behavioural processes have compounds of mental and material processes. For example: laugh, cough, taste, watch, breathe.
	Verbal processes	Verbal processes represent the communication between the <i>sayer</i> , the <i>receiver</i> and the <i>verbiage</i> . Verbal processes are defined by the verb <i>say</i> and synonyms. The representation of this process can reveal the degree of agency of the participants.
	Relational processes	Relational processes refer to the terms used to relate <i>A</i> and <i>B</i> . The relation can represent possessions and opinions among others.
	Existential processes	Existential processes signify the existence of a phenomena, through the verb <i>to be</i> . The presence of existential processes in a discourse can conceal responsibility of the participants.
	Adjuncts	Adjuncts are terms that can be used to modify the meaning of a discourse. For example, adding terms like accepting or expecting to a sentence can diminish the agency of a participant.
	Grammatical	The position of an action with a circumstance

	positioning of actions	can diminish the emphasis of an action. This strategy can be identified with prepositional sentences, subordinate clauses and the use of terms such as <i>for</i> , <i>because</i> or <i>after</i> .
	Abstractions	Abstractions are actions that are generalised rather than specified, which in consequence obscures the action.
Concealing and taking for granted	Nominalisation	Nominalisation changes verbs for noun construction, hence concealing the agency and/or responsibility of the participants, as well as the causes or effects of the action. Nominalisation can also change processes into actors, for example <i>globalization</i> as an entity rather than a process caused by specific political and economic decisions.
	Presupposition	Presuppositions are the meanings that are taken for granted. While communication is based in presuppositions, in CDA we can identify presuppositions that can be challenged to uncover ideologies or hidden meanings.
Rhetoric (figurative language)	Metaphor	A metaphor is the description of a concept through the use of another concept that have a similar function. For example, <i>the body is like a machine</i> .
	Hyperbole	A hyperbole is an exaggeration such as, <i>I've</i>

		<i>told you a million times.</i>
	Personification / objectification	Personification gives human characteristics to inanimate objects and objectification degrades humans with characteristics of objects.
	Metonymy	Metonymy substitutes names for concepts closely related. This strategy can be used to conceal the participants of the discourse.
	Synecdoche	In this strategy, a part represents the whole concept. For example, <i>new blood</i> for new people.
	Metaphor signalling	Metaphor signalling refers to the lexicon used to draw attentions towards a metaphor, such as <i>so to speak</i> , <i>literally</i> or <i>metaphorically speaking</i> .
Modality (committing and evading)		Modals can be used to express certainty levels, hence committing or evading responsibility in the discourse (may, must, etc.). Modality can be described as low or high, depending on the level of certainty. The use of <i>I think</i> or <i>may</i> can be classified as low modality, while something expressed with more certainty would be classified as high.
	Epistemic modality	Epistemic modality shows the participant's judgment of the truth of a given proposition. For example, <i>I may go on holiday</i> or <i>I will go</i>

		<i>on holiday</i> . The second sentence shows certainty.
	Deontic modality	This strategy is used to influence or instruct others. For example, <i>they must work</i> instead of <i>they may work</i> . This modality represents, imperatives, necessities and responsibilities.
	Dynamic modality	This strategy has several objectives. It can show the ability to conduct an action rather than aiming to influence others. For example, you <i>can run</i> . This modality can also represent a prediction of the future according to empirical circumstances.
	Hedging	Hedging is used to reduce commitment and create ambiguity. Hedging can be identified through the use of modals such as, <i>may</i> , <i>perhaps</i> or <i>seems like</i> . Connectors like, <i>nonetheless</i> , <i>although</i> or <i>while</i> , can also be used to identify hedging.

Lexical Strategies from: Machin, D., and Mayr, A. (2012). *How to do critical discourse analysis* (1st ed.). Los Angeles: SAGE.