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Role Theory and Foreign Policy Analysis in Latin America[1]

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This paper generates a framework to understand Latin American foreign relations through the use of Foreign Policy Analysis (FPA) role theory. The use of roles to describe and analyze regional interstate relations has previously been found in the literature on Latin America, but these studies have not taken advantage of the full range of concepts and theoretical implications associated with role theory to analyze the region. The paper develops a typology of states with associated national role conceptions (NRCs) and generates expectations for the sources of those NRCs, as well as elements of the role enactment and role location processes for Latin American states. The paper then illustrates the framework's applicability through a brief analysis of the role location process for Venezuela during the Presidency of Hugo Chávez. The analysis of NRCs selected by the leader of Venezuela, and their reception by role partners and the audience of interested states during the role location process demonstrates the fruitfulness of role theory for understanding Latin American regional relations. The analysis also suggests some modifications for FPA role theory itself as a result of the Venezuelan case.

This paper develops a framework for understanding Latin American foreign relations. This framework is comprised of two main elements: theoretical concepts from FPA role theory and general knowledge about the key theoretical dimensions influencing Latin American foreign policy. Prior research on Latin American foreign policy has used the language of roles, but failed to take into account role theory's rich array of concepts to analyze them in any detail. I draw on our knowledge of FPA role theory, including the NRC, role expectations, role demands and cues, role location and role enactment. This abstract theoretical knowledge about roles is combined with the commonly observed theoretical axes of autonomy versus dependency and pro-core versus anti-core orientations in Latin American foreign policy. The combination of general themes from Latin American foreign policy along with role theory helps to generate a framework for analyzing the region's interstate relations. The paper creates a typology of states with associated NRCs that we expect to observe across Latin American states, and draws on existing literature for the expected sources of such NRCs, and elements of the role enactment and role location processes. The usefulness of the framework is illustrated through the case of Venezuela under President Hugo Chávez.

The paper proceeds with a brief overview of FPA role theory and its applications outside of the Global North. A review of the literature on Latin American FPA provides some general expectations for the types of dimensions that

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influence foreign policy as well as the roles they might generate, which is validated by a discussion of the few existing studies that make use of roles in the region. The general theoretical framework that produces expectations for Latin American NRCs, as well as their sources, and various aspects of the role location process are then explained and configured to guide an analysis of Venezuelan role location and enactment during the Presidency of Hugo Chávez. The analysis suggests that Venezuela has pursued a number of national role conceptions (NRCs) that are consistent with expectations from the framework combining role theory and general Latin American foreign policy expectations. On the other hand, this case raises several interesting issues that may cause us to rethink FPA role theory, including the intensely personal identification of Chávez with the NRCs he identifies for Venezuela, as well as the selection of roles that "mirror" domestic and international expectations for the state. Overall, the paper concludes that FPA role theory exhibits the potential for a framework of study for Latin American FPA, and may even be positively transformed by its application in Latin America.

FPA Role Theory

Holsti's (1970) introduction of role theory to FPA through the NRC has led to a rich and expanding tradition of scholarship within the subfield. His seminal study analyzed the statements of 71 heads of state and government as well as those of foreign ministers between 1965 and 1967. Holsti (1970:260–270) identified 17 major roles expressed by leaders, including: bastion of revolution-liberator, regional leader, regional protector, active independent, liberation supporter, anti-imperialist agent, defender of the faith, mediator-integrator, regional-subsystem collaborator, developer, bridge, faithful ally, independent, example, internal development, isolate, and protectee. FPA role theory from the beginning has therefore assumed that all leaders hold NRCs for their state, regardless of the variation in their regional environments, political systems, and political culture.

The development of FPA role theory has been documented in several books and recent essays (Walker 1987a,c, 1992; Thies 2010a; Breuning 2011; Harnisch, Frank, and Maull 2011), so I will only provide general contours of this development here. Role theory has descriptive, organizational, and explanatory value for the study of foreign policy due to its rich conceptual vocabulary, its ability to cross and bridge levels of analyses, as well as its ease of adaptation to other theoretical approaches (Walker 1987a:2). The concept of role is obviously borrowed from the theater. In this paper, I bridge structural and symbolic interactionist approaches to role theory by examining roles that are both "positions" in an organized group and any socially recognized category of actors, that is, the kinds of people it is possible to be in a society (Stryker and Statham 1985:323). In keeping with FPA analysis, I also assume that roles may be appropriately applied to both individuals and corporate entities like states (Walker 1979:173; Stryker and Statham 1985:330; Barnett 1993:274).

Most of the applications of FPA role theory have focused on explaining NRCs and associated foreign policy behaviors of the states of the Global North, including the United States, Russia/Soviet Union, United Kingdom, France, Germany, Canada, Japan, and Israel (Hermann 1987c; Walker 1987; Stewart, Hermann, and Hermann 1989; Breuning 1995; Le Prestre 1997; Grossman 2005; Elgstrom and Smith 2006; Harnisch et al. 2011; Thies 2012, 2013). Many scholars have also written on variants of the civilian/military power roles for Germany, Japan, and the European Union (Maull 1990; Tewes 1998; Harnisch 2001; Hyde-Price 2004; Sjursen 2006; Whitman 2006; Catalinac 2007; Bengtsson and Elgström 2012).

More pertinent to this investigation of Latin America are the small, but growing number of applications of FPA role theory to the Global South. Chafetz, Abramson, and Grillot (1996) explain Ukraine's choice to give up nuclear weapons due to role demands associated with the great power role, which Ukraine did not believe it could enact at the end of the Cold War. Shih (1988, 2012), Beylerian and Canivet (1997), and Brittingham (2007) explore the sources of China's NRCs and associated behaviors. Barnett (1993) argues that conflict in the Middle Eastern subsystem prior to 1967 was often due to the incompatibility of the two dominant roles (sovereign state, pan-Arabism) foisted upon those states. Ghose and James (2005) describe the variety of contradictory sources of expectations for Pakistan's role in Kashmir. Adigbuo (2007) examines Nigeria's NRCs, while Hermann (1987a) and Singer and Hudson (1987) examine the role sets of a larger sample of African states. Thies (2010b) examines the importance of the rival role to the production of a zone of negative peace in West Africa. Others have conducted studies with more global samples similar to Holsti (1970), such as Wish (1987) and Kowert and Thies (2013). Sekhri (2009) advocates role theory for use across the entire "Third World," by providing a number of examples of its potential usefulness in Africa, the Middle East, Asia, and Latin America. Thus, we see FPA role theory beginning to be used outside of the Global North with more frequency, but what about Latin America? Below we briefly review the literature on Latin American foreign policy and prior attempts to incorporate roles into its study.

Latin American Foreign Policy and Role Theory

A thorough review of Latin American FPA is beyond the scope of this paper, though fortunately several reviews provide comprehensive general outlines within which we can situate a role theory approach. Hey (1997) conducts an extensive review of the literature to distill three "cuts" or "building blocks" of a Latin American foreign policy. While Hey bemoans the lack of a comprehensive theoretical framework and empirical rigor in the area, she argues that we do have a substantial inductive body of knowledge about Latin American foreign policy that revolves around three overlapping dimensions: pro-core versus anti-core, autonomous versus dependent, and economic versus political. Pro versus anti-core foreign policy revolves around whether policymakers are agreeable or hostile to the dominant powers and the international order they enforce. Explanations for this orientation found in the literature include: economic dependence and weakness, domestic political turmoil, a leader's desire for personal and national prestige, public opinion, the ideology of the leader/party/regime, US pressure and influence, as well as the international distribution of power and national security interests. Autonomous versus dependent foreign policy orientations refer to the ability to develop and implement foreign policy with(out) international influence. Explanations for this orientation tend to overlap with the pro- (dependent) and anti-core (autonomy) orientations. They include relative power capabilities, US interest and influence, leader/regime/party ideology, and history of core influence/dependent development. Finally, foreign policy analysts have typically focused on either economic or political-diplomatic policy. Explanations for economic policy include economic vulnerability or strength, leader/regime/party ideology, and some beliefs that economic neoliberalism is the only option available. Explanations for political-diplomatic policy include the use of foreign policy for domestic political purposes, leader/regime/party ideology, as well as country-specific factors related to foreign policy traditions, political culture and policy-making institutions.

Hey (1997:650–651) concludes primarily that Latin American foreign policy is "in essence about dependence." Further, she argues that leader/party/regime

ideology and pressure from the core are the most important factors influencing Latin American foreign policy across the board. The factors influence how Latin American states respond to a situation of dependence. Giacalone's (2012) review of national traditions in Brazil, Argentina, Mexico, Venezuela, Colombia, and Chile arrives at much the same conclusion about the centrality of autonomy and dependency in debates about foreign policy, as do earlier reviews (Drekonja-Kormat 1986). Giacalone (2012:12) notes that the recent wave of theory-driven FPA studies suggest that some degree of autonomy is possible, but disagree on the ways to achieve it (for example, dependency/confrontation, national and heterodox, relative and relational, structural, nonorthodox and concerted autonomy).

Both Hey (1997) and Giacalone (2012) advocate for more theory driven work in the analysis of Latin American FPA. Hey (1997:652) calls for an "integrated theory which not only includes the many explanatory factors, but considers their relative weights and their effect on one another." Such a theory should also bridge the two branches of Latin American FPA: mainstream research in IR and FPA that cross-nationally applies elements of political realism or dependency theory, and comparative politics oriented analysis of single-country case studies. Hey (1998) notes that the same basic factors of political leadership and US hegemony are identified by these two traditions as critical in explaining foreign policy behavior. Role theory does offer this potential to generate a theoretical framework that spans IR/FPA cross-national studies and comparative single-case studies as well as consider the aforementioned theoretical building blocks outlined above that recur in all reviews of the region, though I do not attempt to build such a comprehensive theory here. Fortunately, if one wished to, this effort need not involve the importation of ideas into the study of Latin American FPA that are not already present in the literature. In addition to the foreign policy work described above, there is also a small but vigorous literature on the region's international relations that makes reference to roles.

Ebel, Taras, and Cochrane (1991) authored one of the first studies to consider the political culture of interstate relations in Latin America. Ebel, Taras, and Cochrane (1991:49–50) suggest that Latin American interstate behavior can be explained by the interaction of three broad domestic cultural orientations: political monism, clientelism, and nationalism, which are then projected into the international sphere. Political monism refers to a preference for a top-down order imposed upon society by a charismatic leader or self-selected political elite following some political ideology or set of objectives above reproach. Following Bailey (1963), they argue that Latin American domestic preferences for political monism are extended into the international sphere. Latin American states expect some state to fulfill the role of caudillo or patron.

> "Strong" but benevolent leadership is the ideal of the Latin American in the national sphere. He is not, of course, a masochist, and if the government or caudillo attacks his liberties or what he considers his private concerns, he will resist. At the same time a "weak" government, no matter how benevolent and well-intentioned, is despised and obstructed, especially if it is not, in the individual's opinion, fulfilling its responsibilities. (Bailey 1963:314–315)

According to this argument, Latin American states want "a strong, but not overly intrusive patron who will protect them from the uncertainties of international life" (Ebel, Taras, and Cochrane 1991:51). Excessive intervention prompts a turn away from clientelism to nationalism, which over time will eventually swing back to demands for political monism. In essence, they have proposed an inside-out, cultural approach to explaining variation in foreign policy orientations toward autonomy or dependence.

The presence of an international caudillo in the form of the United States is argued to have had a pacifying effect on regional interstate relations, leading to

what some have called a zone of negative peace (Kacowicz 1998). The zone of negative peace for South America is argued to be a result of the presence of a regional hegemon, a regional balance of power, an external threat to the states in the region, and geographical isolation, irrelevance (lack of intraregional interaction), and impotence to wage wars are potential realist explanations of the South American zone of peace. Of these, Kacowicz's (1998:193–194) qualitative study finds that the presence of the United States as a regional hegemon, and Brazil as local hegemon, were both important in keeping the negative peace.[2] The regional balance of power was important only between 1970 and 1980. Extra-regional threats were of little significance; however, at times, the United States itself was considered a threat.

Thies (2008) argued that the zone of negative peace was equivalent to Wendt's Lockean culture of anarchy based on competition and the rival role.[3] Using the number of active rivalries as an indicator of the size of the Lockean culture/zone of negative peace, he found that the US hegemonic role *vis-à-vis* Latin America supported the Lockean culture of anarchy. Yet, higher ratios of United States to Latin American capabilities threatened to undermine the regional culture, perhaps reflecting overlay by a great power that dominates regional interaction (Buzan and Waever 2003). US interventions in specific dyads in the region had a positive effect on the Lockean culture of anarchy, consistent with the notion that the hegemon is allowed to intervene to preserve order. Yet, the cumulative effect of those interventions in the region posed a serious threat to the regional culture. Economic dependence on the United States is not significantly related to the Lockean culture, in contrast to the arguments of Ebel, Taras and Cochrane who suggest that the United States in its role as the patron has provided markets and capital to the region.

Previous research on Latin America has therefore identified roles such as caudillo, patron, client, regional hegemon, and rival. These roles have been used by scholars to analyze regional interstate culture at a fairly abstract level as would be expected by scholars operating within the more mainstream IR/FPA tradition of foreign policy scholarship. They are identified by scholars themselves through interpretation of the historical record of interstate interaction, as are the NRCs investigated in the analysis of Venezuela below. There do not appear to be any studies of specific NRCs adopted by Latin American states, nor studies of Latin American FPA using role theory in a self-conscious way. This paper provides a template for how role theory might be useful in analyzing Latin American FPA through an analysis of Venezuela under Hugo Chávez.

A Role Theory Framework for Latin American Foreign Policy Analysis

Conceptually, this analysis will draw on role theory to include discussions of role enactment, role expectations, role demands, role location, and audience effects (including cues) as discussed in seminal contributions to the role theory literature (Sarbin and Allen 1968; Biddle 1979, 1986; Stryker and Statham 1985). *Role enactment* refers to how well an individual performs a role in a social setting once it is selected, which may be dependent upon the number of roles held by the individual, the effort expended upon a particular role, and the time spent in one role in relative to others. *Role expectations* consist of norms, beliefs, and preferences concerning the performance of an individual in a role relative to individ-

[2] Mares (2001) argues that the United States as a regional hegemon has not had any impact on the conflict propensity of Latin America. See Kacowicz (1998) for a full discussion of the realist, liberal and neo-Grotian factors he argues are responsible for the zone of negative peace.

[3] Thies (2001, 2005) has explored the origin of the rival role in Latin America as well as its effects on state building, though not specifically from a role theory perspective.

uals occupying other roles. Role expectations may vary depending upon whether they are held by the role occupant (also known as role conceptions or NRCs in this paper), or by occupants of complementary roles, or by the audience. This paper will invest significant effort in identifying NRCs, since they are the building block for studies of FPA role theory (Wish 1980; Shih 1988; Chafetz et al. 1996; Le Prestre 1997). Role expectations may also vary based on their degree of generality, scope, clarity, consensus, and formality of the position. *Role demands* place constraints on the choice of role in a social situation. The *audience* helps to establish the consensus reality for the role, provides cues and sanctions to guide role enactment, and therefore consistency in role behavior through time. *Role location* refers to the interactional process whereby an individual selects an appropriate role for herself within the social structure. Walker (1979:177, 1987b) argues that the conduct of foreign policy is a direct result of the role location process. Thies (2012, 2013) equates role location with socialization, as new members of the international system learn their appropriate roles in response to cues and demands from the audience of member states.

While I do not develop a comprehensive theoretical framework to explain the Venezuelan case, the aforementioned literature generates a number of expectations for the types of roles that we might expect to be adopted by Venezuela, as well as other aspects of the role location process. As noted by Hey (1997) above, we can draw on an inductive body of knowledge about Latin American foreign policy that revolves around three overlapping dimensions pro-core versus anti-core, autonomous versus dependent, and economic versus political. These dimensions reflect role demands due to the context within which Latin America states operate that may lead to the choice of specific NRCs. In this case, we could expect that Venezuela under Chávez is likely to adopt anti-core and autonomous NRCs. We might not expect such a clear division between economic and political NRCs, since so much of Chávez's political goals could only be realized through oil wealth.

Table 1 therefore generates a typology of Latin American states based on the pro-core-anti-core and autonomy-dependence dimension. In order to generate this typology of NRCs, I draw on Holsti's (1970:283–288) discussion of active and passive roles And Thies' (2001) typology of states adapted to the contemporary Latin American region. I locate Holsti's (1970) NRCs, plus those generated by previous Latin American studies in the cells where they are most likely to be found. Since autonomy in foreign policy implies more active roles while dependence implies more passive roles, this division provides the first cut for assigning roles to cells in the table. For example, regional leader, regional protector, bastion of revolution-liberation and anti-imperialist agent are all roles that require a high degree of foreign policy activity and capacity by the state once they are adopted. On the other hand, protectee, isolate, or internal developer each requires little foreign policy activity and capacity on the part of the state that adopts those roles. Some roles are common to all states—the faithful ally and rival roles are basic roles comprising the international system (Wendt 1999), and are thus found in all cells (the level of foreign policy activity and capacity for roles like these can vary greatly). We classify states as major members of the Latin American regional system when they pursue an autonomous foreign policy, since this requires a high degree of capability. As Thies (2001:709) notes, due to their greater capabilities, major members develop and enact a larger number of roles than minor members. They may have socialization duties in their geographic subsystem, but they themselves will also be subject to socialization efforts by great powers if the regional subsystem is a great power's traditional sphere of influence, as it is in this case for the United States. On the other hand, minor members have fewer roles and roles that require less capability to enact. They are often the subject of socialization attempts as clients or protectees.

TABLE 1. Typology of national role conceptions

	Autonomous *Major member*	*Dependent* *Minor member*
Pro-core	Regional leader	Rival
	Regional protector	Independent
	Patron	Faithful ally
	Active independent	Bridge
	Liberation supporter	Protectee
	Defender of the faith	Client
	Regional-subsystem collaborator	Example
	Rival	Internal developer
	Mediator-integrator	
	Developer	
	Faithful ally	
Anti-core	Bastion of revolution-liberator	Rival
	Regional leader	Independent
	Regional protector	Faithful ally
	Patron	Bridge
	Active independent	Isolate
	Anti-imperialist agent	Protectee
	Liberation supporter	Client
	Defender of the faith	Example
	Rival	Internal developer
	Mediator-integrator	
	Developer	
	Faithful ally	

The second cut in this categorization scheme involves sorting roles by their perceived pro- and anti-core orientation. This is also fairly straightforward, since bastion of revolution-liberator and anti-imperialist agent, for example, clearly imply roles and behaviors that are in opposition to the dominant powers or core of the system. Other active roles can be found in either pro-core or anti-core states, such as defender of the faith, mediator-integrator, or developer. The intersection of the two dimensions of autonomy-dependence and pro- and anti-core produce an expected set of NRCs associated with Pro-Core Major Members, Anti-Core Major Members, Pro-Core Minor Members and Anti-Core Minor Members. This typology represents are an initial attempt at building an explanatory framework for the types of NRCs that we are likely to see adopted by states in the region. Many of these roles can be enacted in either an economic or political capacity depending on the situation.

In the case of Venezuela under Chávez, we are likely to categorize the state and its leader under the anti-core/autonomous cell of the table (lower left-hand side) as an Anti-Core Major Member of the Latin American regional system. The kinds of NRCs that we would expect to be adopted by Venezuela include bastion of revolution-liberator, regional leader, regional protector, patron, active independent, anti-imperialist agent, liberation supporter, defender of the faith, rival, mediator-integrator, developer, and faithful ally. We will see that many of these roles are articulated by Chávez on behalf of Venezuela, but we also find a variety of other NRCs as well, helping to flesh out our understanding of FPA role theory as applied to Latin America.

Given these potential NRCs in Latin America, what are the likely sources of these *role expectations*? If we boil down the overlapping sources of foreign policy noted by Hey (1997) above, we find that economic dependence and weakness, domestic political turmoil, a leader's desire for personal and national prestige, public opinion, the ideology of the leader/party/regime, US pressure and influ-

ence, as well as the international distribution of power and national security interests, and a history of core influence/dependent development are potential sources for role expectations. We should expect to see any number of these factors operating to shape the NRCs adopted by Venezuela. In particular, Hey (1997) ultimately suggests that leader/party/regime ideology and pressure from the core are the most important factors influencing Latin American foreign policy. The well-known personality and ideology of Chávez that generates his movement and political party, plus the semi-democratic nature of the Venezuelan regime that he presides over would certainly lead us to expect that he will personalize Venezuelan NRCs in a way that one would not expect in a full-fledged democracy without a dominant populist leader. Since Latin American states are presidential systems, the focus on the leader is not unwarranted. Venezuela, in particular, undergoes a centralization of power in the hands of Chávez and away from the democratically elected legislature during his tenure in office. While I will heed the call by Cantir and Kaarbo (2012) to pay attention to the contested origins of NRCs in democratic systems, Chávez's articulation of NRCs is likely to best represent the foreign policy roles pursued by the state *vis-à-vis* its international role partners. In terms of the other major factor, the perceived pressure from the core (that is, United States) probably varied through his presidency, though certainly would be perceived as increasing after the attempted coup against him that was supported by the United States. This pressure would reinforce anti-core NRCs articulated on behalf of Venezuela.

Our categorization of Venezuela under Chávez as an anti-core/autonomous state, plus our review of Ebel, Taras, and Cochrane (1991), and Kacowicz (1998) suggests that during *role location* and *role enactment* processes the United States as regional/global hegemon will be the primary "other" in role relationships articulated by Venezuela (with Brazil as a possible secondary "other" as a local hegemon) generating *role demands*. We will also expect nationalist roles to be the norm under Chávez as he reacts to perceived clientelism with the United States under the previous Venezuelan regime. Thies' (2008) finding that economic dependence on the United States is irrelevant to the regional peace suggests that Chavez will not be constrained in his adoption of anti-core NRCs even though the United States is one of Venezuela's largest oil customers. In general, given Venezuela's anti-core position, we expect the role location and enactment processes with the United States to be difficult. We would also expect that the primary *audience* for the role location process in which Venezuela's role conceptions confront the role expectations of others will be primarily South American states, though Chávez's anti-core NRCs may generate a more global audience since they implicate a Global North versus South divide.

Thus, our combination of general knowledge about Latin American foreign policy and FPA role theory can generate some expectations about the types and sources of NRCs adopted by states in the region, as well as the likely "others" and audience involved in the role location process. As an anti-core/autonomous state, we were able to be even more precise about those expectations. Our next step is to describe a methodology for identifying NRCs for Venezuela, since they are the building blocks of any studying making use of FPA role theory.

Methodology

There is no definitive methodological account of the best way to identify roles. This paper draws on a general tradition of interpretation associated with the analysis of political culture common to both comparative politics and international relations theory of which Ebel, Taras, and Cochrane (1991) is an example. Generally speaking, there are two main sources of information, primary and secondary that have been combined in many ways by scholars to determine NRCs.

While role theorists have yet to produce a handbook on methodology for the analysis of NRCs, one can easily find examples of the fruitful use of many different approaches to deriving NRCs. In fact, one might think of role theory scholarship as falling on a continuum from purely primary to purely secondary source material with many combinations in between.

On the purely primary source material end of the continuum, we find Holsti's (1970:255–260) seminal article. Holsti derived his NRCs from coding primary sources such as speeches, parliamentary debates, and press conferences of foreign policy officials of 71 governments between 1965 and 1967. Another example is Wish (1980), who also used elite interviews, speeches, and articles produced by 29 political elites from 17 states between 1959 and 1968. In the middle of the continuum, there are studies like that of Hermann (1987b) who coded elite interviews of African leaders for personality traits that she then combined to code for the presence of NRCs based on her own rules about how combinations of traits match up to role orientations. Or consider Walker (1981) who used the data set of NRCs produced by Holsti (1970) in conjunction with a second data set produced by McGowan and O'Leary (1975) on cooperative and conflictual actions by states for his analysis. In this case, previous coding of primary sources forms a secondary source of data for analysis, much like quantitative data produced by the Correlates of War or Polity projects. Finally, on the other end of the continuum are studies that use purely secondary source materials. For example, Walker and Simon (1987) draw on scholarly accounts of events in Southeast Asia to identify roles for their analysis. In fact, this approach to the use of scholarly accounts to identify NRCs has been used quite frequently in recent scholarship. Harnisch (2012) drew on scholarly accounts of United States, Chinese, and German foreign policy episodes to illustrate his typology of role learning. Thies (2012, 2013) used historians' accounts of Israeli and US diplomatic history to identify socialization efforts over various NRCs. Shih (2012) similarly uses scholarly accounts to interpret and understand China's contemporary role conceptions. Bengtsson and Elgström (2012) also draw on scholarly treatments to understand the interplay of the European Union's role conceptions and role expectations held by other illustrated in two brief case studies.

The analysis in this article is based on the use of secondary source materials in the form of scholarly accounts of Venezuelan foreign policy for a couple of reasons. First, the goal of this article is to introduce the idea of foreign policy role theory to scholars of Latin American foreign policy through an illustrative case study of Venezuela. Bengtsson and Elgström (2012) and Harnisch (2012) adopt similar strategies to illustrate their approaches to role theory with highly salient cases. The Venezuelan case under Chávez becomes a plausibility probe of sorts that may convince other Latin American foreign policy analysts of the usefulness of role theory for their research, in part by drawing on their primary research to demonstrate that they are often already using the language of roles.

Second, conducting an analysis of the primary source materials generated by Chávez might seem to have some advantage in terms of representativeness and replication. If we could identify the universe of primary source materials, then draw a sample, we could feel a bit more secure that the NRCs we identify are representative. The "problem" with someone like Chávez is that there are literally thousands of hours of video and audio recordings, along with transcripts of speeches and interviews. Unfortunately, none of this is compiled in any systematic fashion in any particular place. Some of his TV shows are catalogued on the government Web site, others are available on YouTube, but it is clear that even compiling these does not produce the universe of cases to be sampled. In essence, the universe of cases here is unknowable. We could construct an artificial sampling frame, such as all of Chávez's television shows that appear on YouTube or on the government site, then draw a "representative" sample. However, since we

already know that such sampling frames are vastly incomplete, they could not possibly produce truly representative samples of Chávez's verbal and written utterances. In general, the data richness combined with the imperfection of the cataloging lead me to be skeptical that drawing a sample would be any more representative of Chávez's articulations of NRCs than analyzing those contained in contemporary scholarly accounts. Further, using North American primary source material also poses special problems for Venezuela, as Gill, Arroyave, and Soruco (2006) highlight a number of the pitfalls of relying on newspaper accounts for such information in the analysis of US media coverage of Chávez.

Third, using secondary sources in the form of scholarly accounts of Venezuelan foreign policy actually has some advantages. Other scholars, even though they are not using role theory, serve as the catalogers of identities and behaviors articulated by Chávez. I can code NRCs from this material in the same way that I would code a speech made by the man himself. The role theory literature has not produced a coding manual for coding a role, but previous studies reporting intercoder reliability suggest that roles are easy to identify (Wish 1980). As previously mentioned, roles represent structural positions in a society, or the kinds of people it is possible to be in a society. In practice, roles are fairly easy to identify from statements made by individuals or secondary accounts of such statements. Given the wide availability of the scholarly literature, my extraction of roles from these texts can easily be assessed by scholars of Latin America for validity and reliability.

Finally, despite the fact that the use of secondary source materials always contains the possibility of bias and selectivity (Lustick 1996; Thies 2002), scholars of Latin American foreign policy have often made use of secondary sources. When using secondary sources, the best one can attain is to minimize the sources of bias and selectivity. The worst case scenario is when the researcher selects secondary sources based on some shared underlying theoretical understanding that means the theory is being tested by observations generated by the theory itself. Lustick's (1996) example of this phenomenon is an international relations scholar developing a realist theory that is then tested using diplomatic historians' accounts of an event that likely share an underlying realist theoretical orientation. I have already demonstrated that while some scholars of Latin American foreign relations have used the language of roles, thus far none have incorporated the theoretical notions of role theory into their analyses. The secondary materials drawn on for this case are not motivated by role theory at all. It seems unlikely that there is a shared theoretical perspective between these sources generated for other purposes and that of the present study, thus minimizing potential bias. The selection of source material was also not limited in any particular way—I searched for all articles and scholarly books published on the foreign policy of Chávez's Venezuela. It is likely that this approach may miss the articulation of some NRCs, but this is equally possible using primary sources.

Hugo Chávez and the Bolivarian Revolution in Venezuela

Our overview of Latin American FPA and the few studies using role conceptions give us some general expectations of what we might see in Venezuelan NRCs under Chávez. Given the general impression of Chávez as the leader of an Anti-Core Major Member state, we are likely to see anti-core NRCs, NRCs that stress autonomy, and NRCs in both economic and political-diplomatic issue areas. Our classification of NRCs using the autonomous-dependent and pro-core–anti-core dimensions suggests 12 possible roles (see Table 1). Sekhri (2009:431) has already identified several possible roles consistent with these broad categories for Venezuela under Chávez, including "Anti-imperialist Agent," "South–South/North–South Mediator," and "Protector of the South." These roles borrow heavily from her interpretations of NRCs initially identified by Holsti (1970), as will

the analysis below.[4] Giacalone's (2012:9–10) overview of the development of Venezuelan foreign policy suggests that the "the current Venezuelan administration supports a nationalist-Marxist perspective, which is basically anti-capitalist and anti-US" This has led to an approach to foreign policy characterized by "confrontational autonomy," fueled in part by the strategic advantages purported to inhere in being an oil-exporting state. According to this reading, dependency is a political issue, rather than an economic problem. We also have some general insight into the sources of NRCs from Hey (1997) and others, which she succinctly boiled down to leader/party/regime ideology and pressure from the core. Further, we know that the United States will be the primary "other" in Venezuelan role enactment and role location process, which are likely to be difficult. Finally, we know that South American states will be the primary audience, though at times the anti-core NRCs may appeal to a global audience.

One of the interesting themes that emerge below is the personification of the state in the form of Chávez. Chávez repeatedly articulates NRCs for Venezuela as a whole in the external sphere, or the community of patriots who represent the "true" Venezuela internally, that he also occupies or aspires to personally. As he has said "I am not myself, I am the people" (Chávez 2003a:175). On the one hand, this is perhaps not terribly surprising from someone frequently labeled a populist who is attempting to marshal support for his policies and personage within a country. Yet, it is somewhat odd that NRCs are personified to such an extent on the international stage. Scholars such as Hidalgo (2008:79) make similar claims given that "Chávez's entire political project depends on his personal continuance in office." In some ways, Chavez represents a populist Louis XIV of France to whom is attributed the famous statement "L'État, c'est moi." Rather than signify the arrogance of personal, monarchical rule, Chávez claims to embody the people in his opposition to both internal and external enemies.[5]

Zúquete (2008:98) argues that Chávez portrays himself as a "missionary" with all of the spiritual and religious connotations that it carries. The missionary role has both internal and external manifestations. Internally, Chávez seeks to end the long-standing humiliation and suffering of the people of Venezuela at the hands of the elites. Externally, he aims to restore the dignity and independence of Venezuela through leadership of the world against US imperialism. The external dimension reflects the United States as Venezuela's primary other in the adoption of an anti-core and autonomous type of NRC. The missionary NRC thus has simultaneous internal and external dimensions, and is a role both for Chávez personally and for the state. This theme of simultaneous internal and external dimensions is then replayed in a number of related roles articulated by Chávez, including example, martyr, and savior.

The internal dimension of the "example" role has involved Chávez's personal narrative, which emphasizes someone who has made sacrifices in struggle for the cause of the defense of the homeland. Chávez identifies himself as a model of moral virtue. Holsti (1970:268) describes the external version of the example role as emphasizing the "importance of promoting prestige and gaining influence in the international system by pursuing certain domestic policies." Table 1 classified the example role under dependence, given that it is a less active role to play in foreign policy. Yet, Chávez's articulation of the role using the combination of internal and external dimensions elevates this from a more typically dependent NRC to a more autonomous and active NRC. Gott (2008:482) notes how Chávez's model of dealing with foreign companies in oil and gas influenced

[4] Holsti (1970:284–285) included Venezuela in his analysis, but due to the lack of source material did not elaborate on the two roles identified for it during the 1964–1967 time periods other than to say that states with fewer capabilities tended to have less active foreign policy and fewer NRCs.

[5] Hidalgo (2008:79) makes allusions to Bonaparte, rather than Louis XIV.

Evo Morales in Bolivia. Chávez also considers himself a model of the Venezuelan patriot or "soldier of the homeland" (Chávez 2004a). Inherent in these roles, and the larger narrative for Venezuela, is that Chávez has been a victim of persecution at the hands of the elites even as he struggles to restore the dignity of his country. The "martyr" role is therefore also used by Chávez (2006a) in this context, as he has made statements such as "my life belongs to you, my life does not belong to me but belongs to the Venezuelan people, and we will remain together until the end of our days."[6] It is not clear if Chávez means for the martyr role to have an external dimension, with Venezuela potentially suffering the same fate on behalf of other states victimized by the United States and its imperial, globalizing capitalist actions.[7] Chávez is a moral example working to restore the dignity of the Venezuelan people, and he is willing to die in pursuit of these ideals.

Zúquete (2008:104) reinforces the notion that Chávez's roles are both inward and outward looking, as "the battle for justice is twofold: it involves a domestic fight against the 'corruption' and 'impunity' of the powerful and an international fight against the 'tyranny' of neoliberal forces." This requires an active "liberator" role to carry out this two-front war. Holsti (1970:260–261) describes the bastion of revolution-liberator role as on in which it is the duty of the state to "liberate others or to act as the 'bastion' of revolutionary movements, that is, to provide an area which foreign revolutionary leaders can regard as a source of physical and moral support, as well as an ideological inspirer." Chávez identifies himself very closely with Simón Bolívar, even calling himself a second Bolívar at times or identifying the people as a whole with Bolívar. Chávez (2003b) declared that Bolívar "was reborn on February 4, 1992. . .embodied in the people," referring to Chávez's ill-fated coup attempt. Bolívar fought to liberate South America from Spanish colonial rule, and he and his fellow revolutionaries Ezequiel Zamora and Simón Rodríguez are credited with fighting landowners on behalf of the peasants by Chávez (Marcano and Tyszka 2005; Gott 2008). Chávez seeks to liberate South America from the economic and cultural dominance of the United States, as well as the Venezuelan people from the elite who serve US interests. Hence, Chávez's naming of his movement a "Bolivarian Revolution."

Maxwell (2000:122) has expressed the common view of Chávez's detractors that he is in fact a caudillo, rather than a liberator, representing a "step backward to the violent, personalized rule of the charismatic leader on horseback." Sylvia and Danopoulos (2003:67) suggest that he "began forming his strongman populist image with his defiance in the face of defeat during his 1992 coup." Chávez repeatedly rejects the "caudillo" role for himself, as do his supporters (Gott 2008). In fact, he is often dismissive of the "myth of Chávez" that he himself has helped to create (Harnecker 2002:224). Chávez has said that "it would be very sad and unfortunate that a process of change, a revolutionary process, would be dependent on a caudillo" (Harnecker 2002:59–60). Chávez (2003a:256) has also said that the "revolution does not belong to a man or to a caudillo, but belongs to the Venezuelan people."

Chávez uses language to describe a variety of friend and enemy roles both internally and externally. Internally, he describes the "people," the "true patriots" or the "community of patriots" to refer to the downtrodden masses that he is saving from the "oligarchs" or "elite" of Venezuela (Chávez 2003a:85). Chávez (2004b) routinely dismisses the Fourth Republic (1830–1999) as "oligarchic and

[6] Translations from *Aló Presidente* are by Zúquete, unless otherwise noted.

[7] One might postulate that the missionary, example, and martyr roles are auxiliary roles supporting a master "savior" role for Chávez. Master roles are salient in every situation, but require auxiliary roles to support them in particular instances of role enactment (Thies 2001). These constellations of role will require further methodological and theoretical refinement in order to trace their interconnections.

anti-Bolivarian" since it institutionalized the repression of the masses by the elites. Externally, the primary enemy (and significant other) is the United States and its leaders. Chávez (2006a,b) called George W. Bush "Mr. Danger" and "Mr. Devil," and later "coward, assassin. . .alcoholic," and even said that "Hitler would be like a suckling baby next to George W. Bush" (Shifter 2006:57). Yet, the internal enemy of the oligarchy is also aligned with the external enemy of the United States, since they share common economic interests. In Chávez's view, the oligarchy has placed Venezuela in the role of "regional-subsystem collaborator" in the past, and would do so again in his absence. Holsti (1970:265) described this role as geared toward "far-reaching commitments to cooperative efforts with other states to build wider communities," which in this case would mean commitments to neoliberalism and Washington Consensus policies that benefit the elites and impoverish the masses.

According to Trinkunas (2005:39) the Bolivarian Revolution has both a domestic and foreign policy component. The foreign policy component is designed to "defend the revolution in Venezuela, promote a sovereign autonomous leadership role for Venezuela in Latin America; oppose globalization and neoliberal economic policies; and work toward the emergence of a multipolar world in which US hegemony is checked." Therefore, Chávez casts Venezuela as "anti-imperialist agent," which Holsti (1970:264) describes as "agents of 'struggle' against. . .evil." Chávez (2003a:323) fights against the "hegemonic pretension" of the United States in this role. This role of anti-imperialism or anti-hegemony recalls Ebel, Taras, and Cochrane's (1991) description of political monism in the region's culture. Chávez himself does not want to be cast as a caudillo, yet the United States is clearly cast as a caudillo and patron to their clients in the oligarchy. Instead, Chávez (2003a:349) will bring national resistance to bear on the United States, since "we are facing a conspiracy of international dimensions. . .hegemonic world forces want to disrupt the Venezuelan process because in doing that they are disrupting an alternative path for our people." Even the April 2002 coup against Chávez is interpreted as US instigation of those who would oppose the Bolivarian Revolution. The anti-imperialist role is often closely aligned with the savior or martyr roles described above, as Chávez (2005) compares himself to Christ: "Christ was a rebel: Christ lived, He was a human being, an anti-imperialist rebel. . .he wound up crucified."

Zúquete (2008:114) highlights the "totalistic character" of Chávez's politics, as demonstrated by his call for a "comprehensive moral and spiritual revolution" (Chávez 2006b) that will "demolish "the old values of individualism, capitalism, and selfishness" (Chávez 2007). This revolution will lead to a new socialist society with "a new man, a new society, a new ethics" (Chávez 2003a:312). This approach to totalizing reform also has an external dimension in the role of "defender of the faith." Holsti (1970:264) defines this role as commitment to the defense of value systems from attack, including "special responsibilities to guarantee ideological purity for a group of other states." Those who follow Chávez's example in Latin America can expect the assistance of Venezuela, including most famously Fidel Castro in Cuba, Evo Morales in Bolivia, and Rafael Correa in Ecuador.

The domestic role location process has not always been simple for Chávez as he articulates NRCs for himself/Venezuela. He was the subject of a 2002 coup attempt and lost a 2007 referendum that would have eliminated any term limits on him. The opposition was emboldened in the 2008 regional elections and managed to claim two governorships and several important mayoralties, including the Caracas metropolitan area. As Hidalgo (2008:82) notes, the opposition's average vote share has consistently been around 40% since Chávez was first elected president in 1998. Chávez has continuously tried to fragment and route the opposition through whatever means available since he sees them as instruments of the oligarchy. By all accounts, oil is the glue that has so far maintained

Chávez in power, as he engages in social spending through his *misiones* targeted at his key supporters (Sylvia and Danopoulos 2003; Parenti 2005; Parker 2005; Gott 2008; Hidalgo 2008). These missions are targeted at issues related to underdevelopment, including land reform, illiteracy, and healthcare. They suggest an "internal developer" role, which Holsti (1970:269) describes as channeling most of the government's efforts toward problems of internal development.[8]

The international role location process has been easier in some respects, especially with regional neighbors who stand to benefit from Venezuela's oil diplomacy (Sylvia and Danopoulos 2003). Chávez has pursued a "regional leader" role in Latin America, which Holsti (1970:261) defines as "special responsibilities that a government perceives for itself in its relation to states in a particular region with which it identifies, or to cross-cutting subsystems. . ." For example, in 2007, Argentina, Bolivia, Brazil, Paraguay, Uruguay, and Venezuela (all Mercosur members) signed an agreement to create the Banco del Sur based on oil money from Venezuela. Chávez designed the Bank of the South to bypass the World Bank and IMF. Chávez also launched the Bolivarian Alternative for the Americas (ALBA) in 2004, which is an alternative to the Free Trade Agreement of the Americas (FTAA/ALCA). Finally, Chávez also created Telesur in 2005, a 24-hr news channel for Latin America designed to counter the excessive influence of US media outlets like *CNN en Español*. Not all of these efforts have been successful, but when material and ideological interest coincide, Venezuela has found partners with which to enact its regional leader role.

The activities that support a regional leader role often also require an auxiliary "developer" role, described by Holsti (1970:266) as "a special duty or obligation to assist underdeveloped countries." This role has been accepted by the audience of Latin American states as well as specific role partners in the region. Chávez has stepped in to assist Latin American states financially when the opportunity arises, such as purchasing $1.3 billion in restructured Argentine debt and $100 million in bonds for Paraguayan infrastructure development, both in 2006. Chávez has also offered the services of Venezuela's state-owned oil company to assist Bolivia in managing its oil and gas industry, among other types of activities (Burges 2007:1347–1348). In 2005, Chávez started Petrocaribe, which provides oil to 13 Caribbean states with soft financing for nearly half of the bill (Shifter 2006:52). Regional unity is an important feature of the Bolivarian Revolution, and to some extent, Latin American states have responded positively to Venezuela's regional leadership role. Trinkunas (2005) and Burges (2007) note that the primary competitor for the regional leader role in Latin America is Brazil, whose approach to globalization is to secure a more equitable division of income through redirecting trade flows and economic activity rather than to derail globalization as Venezuela proposes. Colombia has also resisted Venezuela drives for regional leadership in many ways, since Chávez has provided both material and moral support for the FARC (Trinkunas 2005:43). Guyana also resists Venezuela in this role given outstanding Venezuelan claims on the majority of its territory. Chavez has even symbolically added an eighth start to the Venezuelan flag to represent its lost Guyanian territory.

Chávez has certainly pursued the "faithful ally" role (Holsti 1970:267) either formally or informally with a number of receptive states, including Cuba, Bolivia, Ecuador, and Nicaragua. Katz (2006:5) notes that Chávez declared that he and Putin had "a genuine strategic alliance," though one that ebbs and flows with arms sales and opposition to US unipolarity. Shifter (2006:55) notes that Chávez

[8] This role may also serve as an auxiliary role that supports the "savior" role by redressing "the injustices created by centuries of oppression. . ." and reinforces "the view that Latin American underdevelopment is due to the vices of its predatory governing classes" (Rodríguez 2008:62). Again, more theoretical work is needed to understand the relationship between master and auxiliary roles (see Footnote 7).

described Iran and Venezuela as "brothers who fight for a just world." While relations between the United States and Venezuela were relatively cordial through the Clinton years, they became much more strained when the George W. Bush administration essentially endorsed the coup against Chávez in 2002 (Clement 2005). Hakim (2006) and others had long noted a neglect of Latin America in US foreign policy, especially after 9/11. Essentially, the United States was generally seen as failing to perform its role as regional hegemon convincingly. That failure in role enactment led the audience of Latin American states to look elsewhere for regional leadership—a role that Chávez was happy to attempt to occupy. While Chávez was increasingly seen as a threat in the United States, especially for his engagement with opponents of US policy like Cuba and Russia, the Venezuelan Ambassador to the United States was still arguing for the United States not to view his country as a "threat to the United States, much less an enemy" (Herrera 2006:198). Trinkunas (2005:40) suggests that the problem is that rather than attempt to maintain an independent foreign policy and maximize its oil revenue, Venezuela under Chávez has moved to explicitly seeking allies to check US power in Latin America.

In general, we can say that Chávez has pursued a wide range of NRCs for Venezuela. Many of these roles are intensely personal for Chávez even as he selects them to represent the people and state of Venezuela. As expected, many of these roles are anti-core, oriented toward autonomy, and have both economic and political dimensions. Venezuela adopted NRCs suggested by our typology, including bastion of revolution-liberator, regional leader, anti-imperialist agent, defender of the faith, developer, and faithful ally. What might be somewhat surprising is that though one might expect that Chávez's personality might make the NRCs he articulated on behalf of the state unpredictable, they are in fact mostly predictable from our framework. One unique aspect of Chávez's articulation of NRCS is that many of the roles have both internal and external dimensions. This dual aspect of roles is not typically considered in FPA role theory. It led to two surprises in our classification of roles: that Chávez adopted the example and internal developer roles, which we typically think of as more passive and thus more dependent. However, the connection between the internal and external dimensions in Chávez's articulation of the role made them entirely consistent with the anti-core/autonomous version of Venezuela he developed. A second unique aspect of this case was that Chávez adopted some personal/state roles not generally observed in the FPA role theory literature, including the missionary, martyr, and savior roles. The sources of these roles are largely from Chávez himself as leader of his increasingly autocratic regime.

Internally, there has always been some degree of domestic opposition to Chávez's roles, though he has persisted despite an attempted coup and other setbacks. In fact, Chávez has explicitly rejected domestic and international attempts to cast himself and Venezuela in the caudillo, client, or regional-subsystem collaborator role, which would place him more in line domestically with the oligarchs and internationally in line with the United States. Externally, the audience of Latin American states has generally accepted the choice of NRCs as well as their enactment, especially when it comes to economically oriented roles like developer that use Venezuela's oil resources. Political roles like regional leader have achieved some success, though not all states desire Venezuela in that role as some would prefer continued US regional leadership and others might prefer the Brazilian alternative. The United States has been the primary external referent for roles like liberator and anti-imperial agent, though it is clear that the United States does not accept the roles that Venezuela is attempting to cast it in, also known as altercasting.

Conclusion: Lessons From Applying Role Theory to Latin American Foreign Policy Analysis

The literature on Latin American FPA and FPA role theory suggested some broad outlines for the kinds of roles we expected to find when looking at Venezuela. Yet, the range of roles expressed by Venezuela is broader and more nuanced than we might have expected. The NRCs identified for Venezuela include missionary, example, martyr, savior, liberator, caudillo, regional-subsystem collaborator, client, anti-imperialist agent, defender of the faith, internal developer, regional leader, developer, patron, and faithful ally. Chávez clearly rejects roles like regional-subsystem collaborator, client, and caudillo—assigning the former two roles to the Venezuelan oligarchy as a warning to his supporters of what Venezuela would be in his absence. The other roles are largely sought by Chávez in the Latin American region and even on the wider global stage in some cases. Chávez has pursued quite an active foreign policy as indicated by the types of roles he has sought, which is different than Holsti's (1970) previous (inconclusive) study of Venezuela and most reviews of the country's prior foreign policy. The evidence about the existence and range of NRCs suggests that Venezuelan foreign policy could be fruitfully analyzed with additional concepts from role theory. Future research could analyze role transitions that occurred as Chávez became president and upon his death, as well as more analysis of the generation/modification/acceptance of roles within Venezuela. The processes of role enactment, including demands and cues from the audience of states could be investigated more thoroughly. Finally, the role location process, including the socialization of "rogue" states like Venezuela also begs for more analysis. All of these elements of FPA role theory could be used to generate a more comprehensive theoretical framework for explaining and understanding Latin American foreign policy that bridge general IR/FPA theory and case-specific studies.

Yet, FPA role theory may run into some limitations in Latin America. For those who would pursue an approach to identifying roles from leader texts, there may be issues in securing those texts. Media coverage of Latin America is uneven in the US press, and may be biased for particularly controversial figures like Chávez (Gill et al. 2006). Much of the direct quotes of Chávez in this paper came from his television series *Aló Presidente*. Most Latin American leaders do not host similar programs readily accessible via Venezuelan government Web sites or YouTube. Actual speeches or even excerpts are difficult to find in English, though many Latin American newspapers are found in the Factiva database and Latin American leaders are putting more material on Web sites in recent years. The problem may soon become one of too much information available to catalog and sample, similar to Venezuela under Chávez. Instead, this paper pursued a more interpretive approach by blending excerpts of Chávez's verbal utterances with the secondary literature on his Venezuela. One risk associated with this approach is that NRCs identified through the analysis of secondary sources may be too mediated given that the source literature is not primarily geared toward the identification of NRCs.

One of the surprises that emerged from the application of FPA role theory to Venezuela was the intensely personal identification of NRCs with Chávez. The roles he articulates are simultaneously personal and national in many cases, especially with roles like example, martyr, savior and liberator. Most prior analyses of NRCs have not found such a strong connection between the leader and the NRC. Whether this is a function of populist leaders in particular is a phenomenon worth future investigation. Most of these roles also have mirror referents in both the domestic and international spheres. This is in part because Chávez believes the struggle he faces domestically is part of a larger process of imperial, capitalist globalization. He must liberate the people of Venezuela as he wishes to

liberate the Global South from US domination, including such domination through national elites or oligarchs. Future research should examine the conditions under which NRCs also have a similar "mirror" effect on domestic and international referents. These two issues: leader personalization of NRCs and the "mirror" effect could produce interesting modifications of FPA role theory as a result of its application to Latin America.

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