

Luiz Inacio Lula de Silva

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Introduction

Hello, and welcome to Rise and Fall. Episode 3. Luiz Inacio Lula de Silva.

Last time, we analyzed articles from The Economist that covered the presidency of Nicolas Sarkozy between 2007 and 2012. Today, we will be shifting our attention to the Americas and look at how El Pais covered Luiz Inacio Lula de Silva's first and last day in office - the 1st of January 2003 and 31st of December 2010. For simplicity, and to stop committing felonies to any Portuguese-speaking ears, I will refer to him as Lula from here on.

Coming from Turkey, I am naturally disposed to be more than ignorant about politicians and leaders from countries outside of the U.S., Europe and the Middle East. However, Lula was a name that I'd heard of before. I'd be willing to bet that many other people might say the same thing - that he is the first Brazilian president they'd heard of, during his term. Ten years after his departure from the presidency, the popularity of his mandates appears to have been matched by the controversy over his legacy.

Lula was only elected in the fourth election to which he ran. For some, this fact proves the character of a man who, unlike his predecessors, was born into a poor family in the Northeast who had to find a place in the sun in the industrial world of São Paulo.

For others, Lula's persistence was the sign of an ambitious man, who spent the 1980s and 1990s building a party and connections in the corridors of power to subvert the young Brazilian democracy. The scandal over the purchase of political favors in Lula's first term, known as a monthly allowance, was for them the first sign of what was to come.

When he won, Lula became the first openly leftist president since 1964, the year of the coup that started the military dictatorship in Brazil. It was the same military dictatorship that ordered Lula arrested for organizing strikes. For some, it was the starting point for a new Brazil, which saw the expansion of social programs like Bolsa Família and Fome Zero, which helped Lula fulfill one of his electoral promises: to ensure that Brazilians had three meals a day. Furthermore, they will say, these promises were made while Lula safeguarded the sustainability and prosperity of the Brazilian economy.

For others, the coming to power of the almost illiterate union leader was the starting point for a degradation of Brazilian political life. They will also say that Lula pulled from his unionist legacy when he was already receiving a lifetime pension for having been a political prisoner, more than enough compensation. Lula started his term with an appeal for national unity and social cohesion. In fact, during his tenure, he implemented social policies with international recognition while promoting the interests of the richest Brazilian classes, to the point that Brazil went through the financial crisis of 2007-2008 relatively unscathed.

For some, this fact is purely true. As proof, they point out how Lula disappointed critics since, instead of following the financial policies of Venezuela Chavista or Argentina Kirchnerista, he built a good relationship with the IMF and used public-private partnerships to promote Brazilian growth.

Critics would say that many of the social policies were created and tested before Lula and that he was favored by the luck of a China thirsting for raw materials to feed the traditional Brazilian export engines. Furthermore, Lula left unresolved financial problems like the sustainability of pensions.

Lula tried, with some success, to make Brazil an arbiter on the world geopolitical stage, as when he mediated talks on the Iranian nuclear crisis. His supporters will agree and add that Lula has made Brazil so important that it is now part of the G20 and a recurring candidate for one of the permanent seats on the UN security council in a hypothetical expansion of this body. Critics will reply that no one wants to know about Brazil and that Lula's third-world geopolitics navigated Hugo Chávez's media ride and the absurd concept of BRICS.

Lula's post-mandate helped a lot in the controversy. After surviving throat cancer, Lula saw his partner in arms from the Workers' Party (the party he helped found in 1980) and political successor, Dilma Rousseff, to be fired after an impeachment in 2016. Worse, in July 2017, after investigations that included the famous "Operation Lava-Jato", Lula was sentenced to 9 and a half years in prison for money laundering and corruption.

After a period of struggle in the streets and corridors of power in Brazil, Lula was finally jailed in April 2018. To help the fall, he saw his candidacy for the 2018 presidential election denied under the Clean Sheet Law which, in short, prevents candidates with a political or criminal record from running for elections for 8 years after the decision, even if there are ongoing appeals.

In 2019, Lula was released from prison.

In other words, Lula is such a passionate character that it is difficult to lose the idea of what happened when, at last, he was president of Brazil. Therefore, Mehmet and I decided to refresh the collective memory of Lula's presidency.

So, why do this refreshing via El Pais? We chose this newspaper for four reasons. One, we wanted to do something different to the first two episodes, and do our analysis through a non-English newspaper. Second, El Pais is a major international newspaper that is known to extensively cover Latin America. Third, El Pais offers a fair amount of access to its articles for free. And last, it is a traditionally center-of-left newspaper - a fitting medium for the background on Lula we just discussed. On this last point, El Pais is also slightly controversial. In 2016, it was revealed that El Pais' Brazilian subsidiary had received funds from Lula's Worker's Party.

So, in general, we expect extremely positive coverage of Lula in both the article on the rise and the article on the fall of Lula.

The news of the rise came on October 22, 2002, two days after the second round of the Brazilian presidential elections. The news of the fall came out on October 31, 2010, on the day of the second round of the Brazilian presidential elections before the results were known. It should be remembered that Lula could not run, given the constitutional limit on presidential terms.

Though we suspect the rise and fall articles from El Pais to be very favorable to Lula, there is still an eight year gap between them. Those eight years are quite dense - not only for what Lula did as president, but also how Brazilian democracy had the chance to mature. A lot may have changed, which is precisely what we look for in this podcast: the nature and evolution of press coverage.

As ever, there is no attempt here to find a fair judgment of Lula's life and work: rather, the characteristics of coverage in Lula's rise and fall are sought. We look at these characteristics under three categories: the technical side, the contents/themes and interesting nuggets.

Part 1: Technical Analysis

And so, we start off with the technical analysis. We focus on the differences before the similarities.

The first difference that we can see is that the author is declared for the rise article, while this is not the case for the fall article. There is also a difference in length. The rise article, with its 704 word count, is significantly shorter than the fall article, which has 945 words. This difference in length can also be felt when one reads the articles. The fall article makes use of much longer sentences - to the point where one paragraph can consist of one sentence. The sentences themselves largely consist of indirect speech. The rise article, on

the other hand, has shorter sentences, with more usage of direct speech. This is more in line with what one might expect from a typical article in a newspaper.

One other difference is the way the articles choose to present their stories. The rise article starts by describing the inauguration of Lula, and then dives into policy, geopolitics and election promises. All of this is decorated with quotes from Lula's speech at his inauguration ceremony. The fall article, on the other hand, does not build itself around an event. It is a commentary on Lula's time in office, who is being set up to succeed him and Brazil's future. Very much in the style of a wizened political commentator telling you their opinion over a cup of tea.

That brings us to the most important difference. The rise article is indeed from the print edition of El Pais - in fact it was one of the cover articles for the day it was published. So its objective is to report an event that has happened. The fall article, on the other hand, was never published in the print edition. It's from the webpage of El Pais - which makes it more likely to be an editorial, where events are commented on.

This explains the differences we have seen - in terms of length, writing style and, as we've touched upon briefly for the time being, content.

We've talked about the technical differences - what about the similarities? When the articles are about a left-wing president from a left-wing newspaper, one would expect that the overall sentiment is positive. That is more or less what we see across both articles. From a qualitative perspective, this is clear at first read. Lula is the charismatic political leader. He might be a populist and rough around the edges, but he has promised policies in the rise article that have been largely delivered according to the fall article.

From a quantitative perspective, things are not so clear cut. This is largely due to the fact that the articles are originally written in Spanish. Algorithms and machine learning algorithms that are widely available for predicting sentiment in texts are largely optimized for English. However we were able to find one repository on GitHub that contains a sentiment predictor model trained on Spanish online retail reviews. We thank the owner of the sentiment-analysis-spanish package for open sourcing this piece of code, as we have used it for this episode.

We do the sentiment analysis in two levels - sentence and paragraph. What does this mean exactly? Let's take the example of doing it at the paragraph level. We predict the sentiment score for each paragraph in an article, and then calculate the average across all paragraphs, to get an idea for the whole article. We do the same for sentences. We do this because the model we are using is trained on texts that are not as long as news articles, so we need to provide it with input that is similar, at least in length, to what it has been trained on.

At the sentence level, the results are 0.086 for the rise article and 0.087 for the fall article. At the paragraph level, the results are 0.27 for both articles. Keep in mind that the scores can be at minimum 0, indicating the most negative sentiment, and at maximum 1, indicating the most positive sentiment. So analyzing paragraph by paragraph paints a happier picture.

But what does this mean really? The scores by themselves should not mean too much, because the model that is generating them is trained on retail reviews - not news articles. This is equivalent to how you might evaluate the review of Italian cuisine by a food taster who specializes in Japanese food. Do they know a thing or two about food? Yes! But would you trust their evaluation of carbonara or of sashimi? Of course the sashimi. It's a similar story with the individual sentiment scores we get.

But should we completely ignore this food taster when in Rome? Well, maybe there is some value to be had in terms of how they compare dishes to each other, rather than a judgement on one dish by itself. They might like the carbonara of restaurant A over restaurant B, and give them different scores. So we might go to restaurant A instead of B.

Looked at this way, the sentiment scores we get per level are essentially equal to each other. So we can say that the sentiment in both articles are not largely different. Going back to our carbonara example - it doesn't matter which restaurant you go to. Both serve the same quality carbonara - whether this is good or bad carbonara is a different matter.

We test this claim, that the articles have similar sentiments, by running the translated versions of the articles through the NLTK package that we've been using in previous episodes. The claim largely holds up. The output is that 5.2% of the rise article has negative sentiments, while this is 4.7% for the fall article. In terms of positive sentiments, it is 15.1% of the rise article while 12.8% of the fall article.

If anyone fits this analysis into the carbonara metaphor I tortured you with, and writes it in the comments, we will send you a cookie.

Part 2: Themes and Contents

We carry onto the second part of our episode - themes and contents of the articles. In this case, we see many more stark contrasts than similarities between the two articles. Yes, both articles express general positivity towards Lula, however they are different about where they focus this positivity on.

In order to help us better deep dive into these differences and similarities, Guilherme generously counted the number of words and sentences in each article that are allocated to Lula's message, economic issues, social issues, geopolitics and Brazilian internal politics. The relative percentage of words and sentences in the rise article for each topic are quite similar to each other. For instance 23% of all words are dedicated to describing economic issues. The percentage of sentences that are dedicated to this is 22%. A fun side fact - this reflects how most sentences in the rise article have similar lengths to each other.

As I said before, in terms of content, the two articles are quite different. The rise article is an introduction to Lula's term in office - where policies are discussed in between quotes of Lula's speech at the inauguration. In this article, Lula the person and his message is front and center. In the fall article, this changes. Lula's time in office and his achievements/failures are barely mentioned. Instead, the focus is on what awaits Brazil going forward - and not only with the heir apparent to Lula - Dilma Rousseff - but with the overall political scene.

Those that are looking for hints of foreshadowing, as we saw in the Sarkozy articles, will be disappointed. No mention is made of a right-wing populist backlash, or of the potential popularity of a little-known eccentric congressman named Jair Bolsonaro. Instead two presidential candidates of the 2010 presidential election are discussed as being potential frontrunners in a future election. These candidates are Marino Silva of the Green Party and Aécio Neves of the center-left PSDB. There is even talk of Marino Silva potentially being able to rule via a left-wing coalition of Lula's Workers Party and his PSDB. The future is predicted as very conciliatory, environmentally-friendly and left wing. An interesting contrast to where Brazil is today in 2020.

We can see this change in terms of content by looking at the share of words used for economic and social issues between the two articles. In the rise article, 23% of all words are dedicated to economic issues, and 14% of all words are dedicated to social issues. In the fall article, these numbers drop to 12% and 4% respectively. This kind of decrease is even more pronounced when we look at the proportion of words dedicated to Lula's message. In the rise article this is a whopping 62% of words. In the fall article, this number is 23%. As statements on legacy are also considered to be a part of this category, this is interesting. The fall article does not give too much space to the direct legacy of Lula. For a left-wing newspaper reporting on a very popular left-wing president, this is noteworthy.

Let's take a minute to digest what this means in the context of Lula himself. One of the most positive things someone can say about Lula is the fact that he lifted millions out of poverty through his social programmes while also honoring Brazil's debts - something only the rise article touches upon as an ambition. Like him or hate him, he actually managed to deliver on his promise of improving the economy and the lives of the poor at the same time. Thus it is surprising that the fall article would not accentuate these points much when compared to the rise article. Perhaps these accomplishments had already been touted many times before by El Pais, and it was time to start talking about the future.

This brings us to the next major difference between the two articles. The rise article makes practically no mention at all of the internal politics of Brazil. Lula's rivals in the presidential election are not mentioned for instance. In the fall article, however, a full 48% of words are dedicated to the internal politics of Brazil and what the future has in store for the country's political landscape. And the passages dedicated to this topic are the exceptionally long ones. Because while 48% of all the words in the fall article are dedicated to

internal politics, these words are squeezed into 31% of the passages. So these sentences are, on average, have 1.5 times more words than other sentences in the fall article.

Although the articles are different content-wise, they are similar in how much relative room they give to geopolitics. 11% of words and passages in the rise article are dedicated to geopolitics - specifically Lula's potential relationship with the United States. The fall article allocates less words to geopolitics - 6% - but a similar amount of passages - 12%. This tells us that these sentences are the relatively shorter ones.

Another similarity is, as stated before, that both articles are generally positive about Lula. The fall article is slightly more constrained in this manner than the rise article. Even the few mentions of Lula's authoritarian or populist tendencies are brushed over quite quickly. The rise article, on the other hand, acknowledges some worries about Lula but then is quick to point out that these may be alarmist

Part 3: Interesting Nuggets

1. No mention of the 2008-2009 financial crisis and end of the commodity boom in the fall article. Or even a mention of the commodity boom in general, that helped Brazil out so much in this period.
2. The first version of the rise article had the inauguration where Latin American countries sent important people. But even the US did not send anyone important.

Conclusion