# IDENTIFYING DELIBERATE METAPHORS IN ECONOMIC AND FINANCIAL PRESS ARTICLES

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*Abstract: Since1980, when Lakoff and Johnson published their seminal work – "Metaphors we live by", most of the research on metaphor has been dominated by the Conceptual Metaphor Theory (CMT). Scholars using this theoretical framework conducted extensive researchinto the cognitive dimension of metaphor. However, over the last years, more attention has been paid to the role of those metaphors which are used as metaphors in communication. Therefore, a new communicative dimension has been added to thecognitive-linguistic framework and a distinction between deliberate metaphors and non-deliberate metaphors has been introduced.*

*Within this broader context, this paper aims to highlight the shift in metaphor research towards the communicative perspective and to apply the deliberate metaphor identification procedure (DMIP) to the studyof metaphors identified in the economic and financial press articles.*

*Key words: Conceptual Metaphor Theory (CMT); DeliberateMetaphor Theory (DMT), deliberate metaphor identification procedure (DMIP), deliberate metaphors.*

## Introduction

The research carried out on metaphors has taken different turns over the years, shifting from old traditional approaches to groundbreaking cognitive approaches and even to more recently developed communicative approaches.

Traditionally, metaphors were believed to pertain to the field of rhetoric and served no other purpose than being used as ornamental devices. Their study goes way back to the time of Aristotle. Although this traditional view was dominant for centuries, the modern cognitive approach represented a major breakthrough in the study of metaphor, and it has come to be known as "the cognitive turn"in metaphor research (Steen, 2011).

Despite the profound impact the cognitive approach has had on the study of metaphor, more recent research has emphasised that the cognitive approach focuses too much on the cognitive dimension, and thus overlooks other important aspects such as the communicative dimension of metaphor.



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Therefore, the aim of the present paper is to draw attention to the turn in metaphor research towards the communicative dimension of metaphor and to use the deliberate metaphor identification procedure (DMIP) for the study of metaphors identified in the economic and financial press articles. For applying DMIP, we have selected an article from the Economist which is part of a larger corpus compiled to study the translation ofmetaphorsin economic and financial articles.

## Theoretical overview – from CMT to DMT

The publication of Lakoff and Johnson's seminal work – "*Metaphors we live by*" (1980) marked a turning point in metaphor research, as it moved away from the traditional view, which widely regarded metaphor as a stylistic ornament or a deviant use of language, towards a view which has since emphasised the essential role that metaphors play in human reasoning and how they make their way into discourse. One of Lakoff and Johnson's central tenets is that "metaphor is pervasive in everyday life, not just in language, but in thought and action" (1980: 3). Moreover, they claim that our entire thought process is "is fundamentally metaphorical in nature" (1980: 3).

In 1993, Lakoff elaborated on the original version of their theory, renamed it and referred to it as "The contemporary theory of metaphor" (in Ortony, 1993: 202). Since then, researchers have used it under the agreed name of the ***Conceptual Metaphor Theory*** (CMT). Evans and Green acknowledge that the conceptual metaphor theory, as initially advanced by Lakoff and Johnson, was one of the first theoretical frameworks emerging within the broader area of cognitive semantics and it "provided much of the early theoretical impetus for the cognitive approach." (Evans & Green, 2006: 286).

Deignan (2017) acknowledges Steen as the first writer who has rigorously attempted to demonstrate the shift from linguistic to conceptual metaphors, explaining "the assumptions that lead linguists to arrive at [...] conceptual mappings in departing from metaphorical expressions in discourse" (Steen, 1999: 58). His initial attempt resulted in the development of a five-step method which was first published in 1999. The five steps initially developed by Steen (1999: 73) are provided below as follows:

1. Metaphor focus identification;
2. Metaphorical idea identification;
3. Non-literal comparison identification;
4. Non-literal analogy identification;
5. Non-literal mapping identification.

In time, Steen's focus shifted towards adding a communicative dimension to the study of metaphors, which led him to confess that "I now feel that a more interesting use of step 5 would be to see it as representing the communicative dimension of metaphor, which would be useful as



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input for the ongoing construction of a context model for the discourse as a whole" (2011: 103). Deignan (2017) appositely observes that, in this latter version of the five steps, Steen starts his analysis from language in use (just as in the previous version), but he also finishes it there, turning back to context with a broader analogical perspective, coming full circle in a way.

Using the title of Lakoff's chapter published in Ortony (1993) – "***The*** contemporary theory of metaphor" (my emphasis) as a starting point for a comprehensive review of the most recent developments in the research on metaphor, Steen (2011b: 28) analyses Lakoff's use of the definite article '***the***' and concludes it is rather infelicitous, as this entails a certain degree of boldness from Lakoff who claims most of the credit for the impact of the cognitive-linguistic approach to metaphor and, at the same time, presents it as '***the***' contemporary theory of metaphor, which by logical deduction means that other contemporary approaches are disregarded. Therefore, Steen draws a clear distinction between "the old contemporary theory" and "a new and improved contemporary theory". According to Steen, the latter is much needed and it would comprise the valid findings of the old contemporary theory, while it would also add some new adjustments to the theoretical framework.

According to Steen, the cognitive-linguistic approach is rather limited in terms of finding answers to various issues about metaphor, which, in his view, require an overarching interdisciplinary approach. Thus, Steen adds a new dimension to the study of metaphor, namely communication, and contends that a new contemporary theory must be based on the interaction between all three dimensions, i.e. language and thought (the ones which previous research has extensively focused on), but also communication:

"Metaphor is not just a matter of language and thought, but also of communication; and metaphor cannot just be approached from a linguistic (or more generally, semiotic) as well as a cognitive (or more adequately, psychological) perspective, but it also demands a social approach." (2011b: 28)

Steen (2011, 2016) believesthat the issue of deliberateness lies at the core of the communicative dimension of metaphor, which "deals with the communicative status of metaphor *as* a metaphor (or not)" (2016: 119). Steen (2011) posits that the contemporary metaphor research has ignored the phenomenon of deliberate metaphors. Furthermore, he highlights that the study of metaphor in language focuses on the distinction drawn between metaphor and simile, whereas the study of metaphor in thought focuses on the distinction between conventional metaphors and novel metaphors, in a similar vein, the study of metaphor in communication focuses on the distinction between deliberate metaphors and non-deliberate metaphors (2011b: 37). The distinction between deliberate and non-deliberate metaphors depends on whether or not metaphors produce a change in terms of the perspective projected on the target domain. Consequently, Steen acknowledges that from this perspective, deliberate metaphors offer exciting possibilities "for application and intervention in the diverse practice of language users, in the media, education, organizations, health and care, politics, and so on" (2011b: 38).

The emergence of other approaches to the study of metaphor, which stem from varied fields such as functional linguistics, applied linguistics and discourse analysis, leads Steen to draw the conclusion that the old cognitive-linguistic framework can no longer encompass metaphor's



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diverse aspects.Thus, the change of perspective from language to thought, which characterised the old contemporary theory, is moving even forward nowadays "from metaphor in thought to metaphor in language, thought, and communication" (2011b: 44).

Steen's proposal of a broader model (2011, 2015) encompassing all three dimensions has come to be known as the Deliberate Metaphor Theory (DMT). One of the central tenets of DMT involves attention. Steen contends that we can talk about a deliberate use of a metaphor "when its structure signals that the addressee has to move away their attention momentarily from the target domain of the utterance or even phrase to the source domain that is evoked by the metaphor-related expression" (2015: 68). By logical deduction, such a shift in attention towards the source domain does not take place in the case of non-deliberate metaphors.

## Applying the Deliberate Metaphor Identification Procedure (DMIP)

Steen highlights that deliberate metaphors act as "perspective changers" (2016: 116), which means that they offer an outside perspective on the utterance's target domain by focusing attention on the utterance's source domain referent.

Reijnierse et al. (2017) distinguish between two different perspectives when it comes to the identification of deliberate metaphors, namely a semiotic and a behavioural perspective. For reasons of theoretical rigour, they explain that the former represents a structural-functional description of the metaphorical meaning, whereas the latter focuses on how language users process metaphorical utterances in the production phase as well as in the reception phase. Reijnierse et al. (2017) adopt the semiotic approach to the identification of deliberate metaphors, and this entails that they make no claims about what happens in language users' minds in the production and processing phases. Therefore, the authors clearly state that using the semiotic approach leads to the identification of '*potentially'* deliberate metaphors (2017: 133). Following the same line of thought, the present paper employs the same approach and uses the DMIP to identify the potentially deliberate metaphors in the selected article.

According to Reijnierse et al., a "metaphor is potentially deliberate when the source domain of the metaphor is part of the referential meaning of the utterance in which it is used" (2017: 136). The six steps below represent the Deliberate Metaphor Identification Procedure (DMIP) developed by Reijnierse et al., which uses the MIPVU procedure as a starting point:

"1. Read the entire text to get a general idea of what the text is about.

2. Apply the Metaphor Identification Procedure Vrije Universiteit (MIPVU) to find all metaphorical lexical units (metaphor-related words, or MRWs; see Steen et al. 2010, for detailed instructions).

3. Look at the first MRW.

4. Determine whether the source domain of the MRW is part of the referential meaning of the utterance in which the MRW is used.



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a. If 'yes', mark the MRW as potentially deliberate and proceed to step 5.

b. If 'no', mark the MRW as non-deliberate and proceed to step 6.

c. In case of doubt, mark the MRW as potentially deliberate, and add the code WIDLII (When In Doubt Leave It In; see Steen et al. 2010). Then, proceed to step 5.

5. If the MRW is coded as potentially deliberate in step 4, describe how the source domain of the MRW is part of the referential meaning of the utterance.

6. Look at the next MRW." (2017: 137)

In this paper, the procedure has been applied to identify potentially deliberate metaphors in a specialised economic article selected from *The Economist*, and our analysis focuses on the first two paragraphs of the article. The main topic of the article revolves around America's economic growth which has mainly been driven by entrepreneurs over the years. However, it has faced difficulties because of repeated financial crises. The title of the article and the first two paragraphs are provided below:

Title: "Fixing[MRW] the capitalist machine[MRW]"

(1) "AMERICA has been the world's most important growth[MRW] machine[MRW] since the second world war. In the 1950s and 1960s its GDP grew[MRW] by 3% a year despite the economy's maturity[MRW]. In the 1970s it endured[MRW] stagflation but the Reagan revolution[MRW] revived[MRW] the entrepreneurial spirit[MRW] and the growth[MRW] rate returned[MRW] to[MRW] 3% in the 1990s. The machine[MRW] was good for the world as well as America—it helped spread[MRW] the gospel[MRW] of capitalism and transform the American dream[MRW] into[MRW] a global dream[MRW]."

(2) "Today the growth[MRW] machine[MRW] is in[MRW] trouble. It[MRW,impl] all but exploded[MRW] in[MRW] the financial crisis[MRW] of 2007-08. But even before then it[MRW,impl] had been juddering[MRW]. Examine[MRW] the machine's[MRW] three most powerful pistons[MRW]—capital markets, innovation and the knowledge economy—and you discover[MRW] that they[MRW,impl] had been malfunctioning[MRW] for a decade."

(*Fixing the capitalist machine*, The Economist, September 29th 2012)

Once the entire article was read, the MIPVU procedure was used to identify metaphorical lexical units. The metaphor-related words (MRWs) were identified with the help of two English dictionaries, i.e. the Macmillan and the Longman online dictionaries.

Not all identified MRWs count as deliberate metaphors. Thus, from the examples provided above, a brief analysis will be conducted on those examples that instantiate the AMERICA/AMERICAN ECONOMYIS A MACHINE conceptual metaphor.

A quick look at the title and the paragraphs tells us that 'machine' is the most recurrent word. It appears once in the titlewhere it is preceded by the adjective 'capitalist', twice in the first paragraph and here it is once preceded by 'growth', and four times in the second paragraph, in its



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first use, it is preceded by 'growth', the next two of these four uses are in fact cases of substitution, the pronoun 'it' substitutes the notion of 'growth machine' (and thus they also count as implicit metaphors), and in its last use it stands on its own without any pre-modification.

The noun 'machine' belongs to the field of equipment and tools. Obviously, it stands out as being different from the overall target domain of the text, which is the American economy in general or economic growth in particular.A broader conventionalised metaphorical meaning can be found in the dictionary, but it does not match completely the target domain of the text.

Sullivan (2013) calls adjective-noun combinations such as the 'capitalist machine' used in the title metaphorical domain constructions - MDCs. These are comprised of a metaphorical noun which is modified by an attributive adjective that is used non-metaphorically. Sullivan calls them "domain adjectives" as they clearly indicate the target domain of the metaphorically used noun they precede.

The domain adjective used in the MDC in the title serves the purpose of highlightingthe target domain meaning of the noun 'machine'. According to Steen (2016), cases like this are signals that there is a mapping from the source domain to the target domain, in our case, from machine to economy. Further analysing the co-text of 'machine', we notice that additional information is provided that strongly suggests that all uses of 'machine' count as potentially deliberate metaphors.

Having a closer look at the title first, we identify another lexical unit that counts as a metaphor-related word, 'fixing' which also belongs to the source domain. The first meaning listed in the Longman dictionary for the verb 'to fix' is "to repair something that is broken or not working properly". However, there is also another meaning that matches the target domain of the text: "to find a solution to a problem or bad situation". In case the lexical unit was analysed in isolation, we could reach the false conclusion that we deal with a conventionalised use of the lexical unit, and thus it would be classified as a non-deliberate metaphor. It is worth noticing that if it were not for the domain adjective 'capitalist' the rest of the title would exclusively belong to the source domain. It is precisely the use of the domain adjective that determines a shift in attention towards the mapping that is produced.

For a more detailed analysis of 'machine' in the two paragraphs, a deeper exploration of its co-text is needed. Reijnierse (2017: 102) claims that co-text plays a crucial role in the identification and analysis of potentially deliberate metaphors. Moreover, she defines co-text as "additional textual information, either in the form of the immediate words surrounding a metaphor, or the surrounding phrases, sentences, or even the entire text" (2017: 102).

Such an in-depth analysisreveals the existence of a more elaborate metaphorical scenario, i.e. an extended metaphor. Semino classifies a metaphor as extended when "several metaphorical expressions evoking the same source domain and describing the same target domain [occur] in close proximity to one another in a text" (2008: 227).

When used for the first time in the first paragraph, 'machine' appears as part of a noun-noun metaphor as it is preceded by an attributive noun 'growth'. 'Growth' was identified as anMRW whose meaning is conventional as it has a whole separate entry related to the target domain (economy) in the Longman dictionary, i.e. "an increase in the value of goods or services



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produced and sold by a business or country". As the article is a specialised economic article, it is more than obvious that 'growth' refers to economic growth, and that it is used here as an attribute of 'machine'. Its role is to further specify one of the meanings that is available in the Macmillan dictionary "the people and things that are used for achieving a particular aim". By using 'growth' as an attribute it is clear that the aim is generating economic growth. Using 'growth' as a target domain specific referent signals the potential use of 'machine' as a deliberate metaphor.

Although the two paragraphs contain other MRWs that represent conventional metaphors,for example'revolution, 'returned', 'dream', 'crisis', 'discover', etc., because they describe one thing as another, these do not stand out as deliberate metaphors as their source domain referents do not belong to the referential meaning of the utterance. By contrast, a closer look at the second paragraph reveals the presence of other lexical units that all have a machine-related source domain meaning, i.e. 'exploded', 'juddering', 'examine' 'pistons' and 'malfunctioning'. When experiencing a severe financial crisis, the 'machine' almost 'exploded', the prior conditions were not better as the 'machine' had been 'juddering' for some time. It was enough to 'examine' its most important components, its 'pistons' to realise that they had been 'malfunctioning' for a decade. It is more than obvious that each of them stands out as a deliberate metaphor, as they all introduce referents from the external source domain of a 'machine' to the referential target domain meaning of the text, i.e. the economy in general and economic growth in particular.

After analysing both paragraphs, the title of the article stands out as a logical conclusion to the problematic situation described in detail in the 'machine' extended metaphor, measures must be taken to repair the damages and to make the 'machine' operate again.

Choosing to use the 'machine' deliberate metaphor and not another one may have clear implications on the way columnists deliberately choose to depict economic and financial realities and on how readers may view and interpret these realities from a specific perspective. A machine my produce the desired results, but it can also break down, in which case, if correct action is taken it can be fixed, however there is also the risk that the damage might be permanent. Obviously, speculations can be made and using a specific deliberate metaphor can generate various interpretations. However, the manner in which such metaphors are produced or processed by language users may only be tested with the help of studies conducted from a behavioural perspective.

## Conclusions

The major theoretical shifts in metaphor research have been outlined in the present paper. Moreover, the paper has mainly focused on the most recent theoretical developments that have broadened the conceptual metaphor theory and have led to the recent addition of a new communicative dimension to the previous linguistic and cognitive dimensions which have dominated metaphor research over the last four decades. This new communicative perspective highlights the use of metaphors as metaphors in communication, and thus makes a clear distinction between deliberate metaphors and non-deliberate metaphors. This distinction has laid the foundations for Steen's proposal of a Deliberate Metaphor Theory.

For a practical demonstration of how this new approach applies in real natural discourse, an article from The Economist has been chosen and deliberate metaphors related to the 'machine'



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source domain have been identified and analysed. The examples provided in the analysis indicate that deliberate metaphors used in economic and financial articles play a crucial role in the way these realities are depicted in the specialised press. The present paper merely shows their potential for future more extensive research that may reveal the implications of their use in specialised discourse.

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