“This timely volume authoritatively develops the idea of the critical incident as a key sensitizing concept in journalism studies. The book offers a rigorous conceptualisation, followed by a truly global and diverse range of case studies—from the Hong Kong demonstrations to the Rwandan genocide. In opening up new ways of seeing journalism, the book stands as both an invaluable contribution to knowledge and indispensable reading for students and scholars of journalism.”

Professor Karin Wahl-Jorgensen, Cardiff University

“A book that offers fresh perspectives on critical incidents in journalism was long overdue, and Joy Jenkins, Edson C. Tandoc Jr., Ryan J. Thomas, and Oscar Westlund are perfectly placed to competently and authoritatively lead such an ambitious global endeavor. Using meticulous research, rigorous analysis, and influential scholarship, their volume presents new methodological and theoretical directions that will undoubtedly help shape the future of journalism studies.”

Professor Bruce Mutsvairo, Auburn University
This edited collection examines critical incidents journalists have faced across different media contexts, exploring how journalists and other key actors negotiate various aspects of their work.

Ranging from the Rwandan genocide to the *News of the World* hacking scandal in the UK, this book defines a critical incident as an event that has led journalists to reconsider their routines, roles, and rules. Combining theoretical and practical analysis, the contributors offer a discussion of the key events that journalists cover, such as political turmoil or natural disasters, as well as events that directly involve and affect journalists. Featuring case studies from countries including Australia, Germany, Brazil, Kenya, and the Philippines, the book explores the discourses that critical events have generated, how journalists and other stakeholders have responded to them, and how they have reshaped (or are reshaping) journalistic norms and practices. The book also proposes a roadmap for studying such pivotal moments in journalism.

This one-of-a-kind collection is a valuable resource for students and scholars across journalism studies disciplines, from journalism history, to sociology of news, to digital journalism and political communication.

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The Editors
INTRODUCTION: THEORIZING CRITICAL INCIDENTS IN JOURNALISM ACROSS THE GLOBE

Joy Jenkins, Edson C. Tandoc Jr., Ryan J. Thomas and Oscar Westlund

The COVID-19 pandemic created an unprecedented situation for journalism and aggravated financial struggles that many news organizations have wrestled with for the past decade. With thousands of cities around the world put into lockdown, newspaper deliveries became impossible, forcing some outlets to shutter their print editions. In the Philippines, the popular tabloid Bandera ceased its print publication after 30 years (Inquirer Bandera, 2020). A wave of pay cuts and layoffs swept across newsrooms in India, where many journalists were infected with COVID-19 (Dutta, 2020). In the United States, layoffs, furloughs, and consolidations became commonplace, with dozens of newsrooms closing permanently due to the economic impact of COVID-19 (Doctor, 2020; Hare, 2020).

Across continents, news publishers saw increases in reader payments, but with advertising revenues plummeting and only some governments offering financial aid, the future of journalism has become increasingly dark (Olsen et al., 2020). While journalists kept their communities informed about the outbreak, newsrooms were essentially emptied, with journalists shifting to working much more from home and coordinating their news production processes via technological systems like Slack and Zoom. COVID-19 aggravated enduring problems in journalism, highlighted journalism’s important and evolving social roles, and posed challenges to journalistic norms and routines. As it plunged the world into a pandemic, COVID-19 became a critical incident for journalism.

A pivotal moment

A critical incident refers to an event or development that leads journalists to reconsider “the hows and whys of journalistic practice” (Zelizer, 1992a, p. 67). It is a moment that can be pivotal for journalism as it provides “discursive opportunities for journalists to ensure the well-being of their interpretive community by
reconsidering, rearticulating, and reinforcing their boundaries and authority” (Tandoc et al., 2018, p. 676). In helping to illuminate what norms, functions, and practices journalists cherish and defend, studies of critical incidents in journalism contribute to a more nuanced understanding of the sensemaking that journalists engage in, as well as to a growing cache of collective memory and lessons learned that can guide current and future stakeholders of journalism in navigating what shapes to be a challenging future for the field.

As the world witnessed a global health crisis, media leaders, politicians, academics, and many others took to newspaper columns, television talk shows, and social media to trumpet the vital importance of journalists’ work. A column in *The Atlantic* even instructed readers to: “Wash your hands. Don’t touch your face. And buy a subscription to your local newspaper” (Waldman & Sennott, 2020, para. 1). In a cruel twist, just weeks later, *The Atlantic*, which had been widely praised for its pandemic coverage, announced dozens of layoffs (Tracy, 2020).

Audiences turned to their local newspapers and broadcasters for credible and localized information about testing, closures, and infection rates, resulting in record traffic and viewership numbers. Even so, many of these outlets, particularly in countries like the US and UK, face the potential of an “extinction-level crisis,” as a *Guardian* headline declared (Gabbatt, 2020), with the enhanced attention from readers and viewers failing to compensate for years of declining revenues as a result of the rise of digital media and competition for advertising and attention.

The pandemic triggered various forms of reflection on journalism’s role in a global crisis. An article published by the International Journalists’ Network advocated for a *solutions journalism* approach to covering the pandemic (Neil, 2020). Journalists were playing new roles as they covered the coronavirus outbreak, navigating shifting work routines, coverage of a complex topic, and risks to their own health; in light of this, the World Association of Newspapers and News Publishers (WAN-IFRA) took steps to support and protect the physical and mental well-being of journalists (Flueckiger, 2020). Multiple emergency funds to support news organizations and journalists were also introduced. COVID-19 became a pivotal moment for journalists around the world, a critical incident that spotlighted journalistic rules, roles, and routines.

### An interpretive community

Critical incidents “refer to those moments by which people air, challenge, and negotiate their own boundaries of practice,” and in journalism, these key public events help illuminate “different rules and conventions about journalistic practice and authority” (Zelizer, 1992a, p. 67). Critical incidents are important for journalists to establish meaning and collective memory around their work, particularly during a crisis (Gilewicz, 2015). By triggering a process of reflection, critical incidents shed light on the ideals that journalists uphold, the boundaries they build around their work, the inconsistencies that they otherwise would not discuss, and the weaknesses that they otherwise might not articulate. Although these narratives
tend to rely on established understandings of the roles, practices, and influence of journalists, they can also lead to self-reflection and debate.

Such a process of reflection is characteristic of an interpretive community, defined as “a cultural site where meanings are constructed, shared, and reconstructed by members of social groups in the course of everyday life” (Berkowitz & TerKeurst, 1999, p. 125). Journalists construct the meanings, norms, and boundaries of their work in the journalistic artifacts they produce as well as through negotiating these same meanings, norms, and boundaries in their day-to-day routines. Considering journalism as an interpretive community asks us to conceptualize journalism as a field bound by commonality and “united through [a] shared discourse and collective interpretations of key public events” (Zelizer, 1993, p. 323). Critical incidents help to bring these discourses to the fore.

In her work defining critical incidents, Zelizer (1992a) identifies two key elements: technology (i.e., the tools, systems, and platforms through which events are constructed as news), and archetypical figures (i.e., those figures behind the technologies). These elements were prominent in the three key events in journalism history that Zelizer addressed in her work: the Watergate scandal, the assassination of U.S. President John F. Kennedy, and the Vietnam War. The Kennedy assassination, for example, functioned as an opportunity for journalists to converge around the rise of TV and debate its legitimacy as a news platform (Zelizer, 1992a, 1992b). Journalists also centralized their position in the assassination coverage, broadening the story to incorporate their roles within it, emphasizing particular journalistic players and their authoritative functions, and retelling the story from their own viewpoints. Ultimately, within the discourse of critical incidents, “the narratives that survive are those that have been shaped and reconditioned to shed the best possible light on their tellers” (Zelizer, 1992b, p. 373).

Building on this conceptualization, scholars have identified other critical incidents through which journalists have publicly negotiated significant shifts and defining moments in their professional practice, such as the terrorist attacks of September 11, 2001 (Parameswaran, 2006) and Rolling Stone featuring one of the perpetrators of the 2013 Boston Marathon bombing on its cover (Jenkins & Tandoc, 2017). More recently, journalists, politicians, and the public have paid increasing attention to the production and spread of “fake news,” which has generated attention in the scholarly community as well. As such, “fake news,” which has been defined and operationalized by scholars (Tandoc et al., 2018) and audiences (Nielsen & Graves, 2017) in myriad ways, represents a critical incident. For example, US news publishers attempted to define and assign blame for the issue, particularly emphasizing the role of a polarized political environment (and the influence of Donald Trump), the spread of misinformation and disinformation through social media platforms, and the responsibility of audiences to possess the literacy to detect it and the will to counter it (Tandoc et al., 2019).
Metajournalistic discourse

Research on critical incidents has primarily drawn insights from *metajournalistic discourse*, or public expressions about the texts, practices, and reception of journalism, which allow those from both inside and outside the field to engage in a process of “establishing definitions, setting boundaries, and rendering judgments about journalism’s legitimacy” (Carlson, 2016, p. 350). Metajournalistic discourse is intertwined with critical incidents in that once an incident is deemed “critical,” whether by a journalist or actor outside journalism and whether immediately or in retrospect, it is constructed and shaped in metajournalistic discourse as members of the interpretive community negotiate meanings and legitimize their authoritative roles.

These discourses tend to privilege journalists, by nature of their access to channels and platforms for mass distribution, but the rise of digital media has also enabled other types of actors to create their own interpretive communities via online comments, social media, blogs, and other platforms (see, e.g., Antony & Thomas, 2010; Craft et al., 2016; Jenkins & Tandoc, 2017; Robinson, 2015; Tandoc & Jenkins, 2018). For example, when *Gawker* outed a married Condé Nast executive who allegedly contacted a gay male escort, not only did other media outlets condemn the article, but commenters on the now-closed online outlet’s website also disregarded the article as gossip, unethical, and irresponsible, leading to its removal (Tandoc & Jenkins, 2018). This example suggests that definitional control over critical incidents is not limited to journalists. Rather, because the journalistic field is constrained and transformed by its interrelationships with adjacent fields, such as the political and economic realms (Bourdieu, 2005), a range of other actors, from politicians to the public to other peripheral actors involved in journalism (Belair-Gagnon et al., 2019; Eldridge, 2019), contribute to defining what journalism is, what it is not, and what it could and should be.

These developments highlight another key concept associated with critical incidents: *boundary work*. Actors in the journalistic field engage in boundary work as they clarify the rules of the game, including distinguishing between “insiders vs. outsiders, of acceptable practices vs. deviant ones, of us-vs.-them distinctions made by institutions and individuals alike” (Lewis, 2015, p. 218). Previous research on critical incidents has highlighted these distinctions, including mainstream journalists distancing themselves from the paparazzi in the wake of Princess Diana’s death (Bishop, 1999); criticisms of the public journalism movement as indications of anxiety around the effects of profit orientation on journalistic autonomy and news coverage (Haas & Steiner, 2002); journalists’ embrace of their professional identity and debates over the superior news medium in response to coverage of the September 11, 2001 terrorist attacks (Parameswaran, 2006); and the popularity of *The Daily Show* spurring journalists’ reflections on the blurring of news and entertainment and objectivity and subjectivity (Feldman, 2007).

In the US, critical incidents associated with police violence toward African Americans are strongly related to Black Twitter activism (Richardson, 2017). During spring 2020, such police violence spurred “Black Lives Matter” protests
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across the US and around the world, unfortunately leading to further violence, including police officers attacking and suppressing journalists. These events also spurred reflection among journalists, scholars, and others about the relationship between race and objectivity (Lowery, 2020); racial inequality in newsrooms (French, 2016); and media framing of protests and activism (Jackson, 2020), among other issues.

Reflecting on critical incidents

The growing constellation of studies focusing on critical incidents in journalism can reveal the rules, roles, and routines that the interpretive community of journalists—as well as other stakeholders—idealizes, upholds, and defends. Based on this growing body of work, we can conceptualize a critical incident in journalism as referring to pivotal moments that activate processes of reflection among members of an interpretive community about important characteristics of their work and that might result in material consequences, either to their own community or to society at large. Yet work on critical incidents in journalism also raises other important questions. In a period when journalism is confronted by a plethora of challenges, what constitutes a critical incident? If critical incidents trigger an important process of reflection on the norms, functions, and practices of journalism, who can take part in such a process? How do we capture and comprehend such reflections? And where should these reflections ultimately lead us?

With these questions in mind, we embarked on a project to unite explorations of critical incidents in journalism from different parts of the world. We organized a pre-conference at the 2019 International Communication Association (ICA) annual conference in Washington, DC, featuring presentations addressing critical incidents based on three themes: covering critical incidents, responding to media violence and repression, and engaging in journalistic introspection. These presentations helped to illuminate the ways journalists reflect on their practices, the criteria guiding their reflections, and the conclusions that result from these processes. In developing understandings of source constructions in journalism, influences on journalistic autonomy, journalistic self-reflection in the face of crisis and scandal, and the embrace of new actors in journalistic work, these presentations also helped to establish why examining critical incidents is essential to the development of journalism studies. This pre-conference functioned as a formative event for our ambition of developing this book, with the vision of bringing together case studies of critical incidents from around the world and learning from the introspection they have triggered.

Through an array of case studies, this book seeks to advance knowledge about the conceptualization, characteristics, communities, and consequences involved in critical incidents in journalism. The 18 chapters that follow evaluate critical incidents from different levels of analysis, including that of individual journalists, interpretive communities of journalists, and interpretive communities of actors outside journalism, as well as at particular points in time or during a specific historical period,
via a single case study or a set of case studies, within a single nation or among multiple nations, and even as an “uncritical incident.”

Some authors draw from the cultural tradition of journalism studies, seeing “journalism through journalists’ own eyes, tracking how being part of the community comes to have meaning for them,” while others draw from journalism studies’ historical tradition, theorizing distant events as critical incidents from the vantage point of the present (Zelizer, 2017, p. 151). Authors use methodological approaches ranging from textual analysis of news texts and social media posts, to interviews with journalists and those involved with journalistic work, to archival analyses, to multi-method case studies. They also seek to develop and advance this burgeoning area of scholarship by identifying the factors that define a critical incident, addressing when and how an incident becomes critical, considering the role of actors outside journalism in critical incidents, examining the norms and boundaries invoked in discourse, and questioning whether critical incidents are dependent on a marked change in journalistic practice and how wide a critical incident’s ripple effects must be in order to be truly “critical.”

**Organization of the book**

This book is divided into four sections addressing different aspects of critical incidents. Section I (Conceptualizing Critical Incidents) focuses on conceptualization and establishes the theoretical and conceptual foundations of critical incidents, as well as the methodological choices that follow as one applies the critical incident concept to empirical work. In Chapter 1.1, Paul D’Angelo considers how the critical incident concept has been defined and the ways it has been deployed in journalism studies. D’Angelo tracks the roots of critical incidents as socially constructed discursive strategies among journalists and the ways incidents—which take the form of accidents and scandals—become “critical.” He also links critical incidents to interpretive communities and how actors invoke notable events from the past to make meaning of current professional concerns as well as engage in paradigm repair, boundary work, and collective memory.

In Chapter 1.2, Matt Carlson, whose earlier development of the concepts of metajournalistic discourse and boundary work in journalism studies has played a key role in defining understandings of critical incidents (see, e.g., Carlson, 2012, 2015, 2016, 2018a, 2018b), examines the scholarship in this area through three lenses: conceptualizing the dimensions of existing research, identifying the spaces for research, and addressing methodological and reflexivity concerns associated with studying critical incidents in the digital media environment. The chapter chronicles the history and development of critical incidents research, establishing important criteria for identifying and evaluating critical incidents and suggesting questions to carry this line of work forward.

Section II (Characteristics of Journalistic Work) features case studies from around the world to illuminate the role of critical incidents in discursively negotiating various characteristics of journalistic work, in the form of journalistic norms, routines,
and ethics, as well as external influences and threats. The first three chapters in this section focus on journalists’ reflection about their own practices, from how they define the boundary between inspiration and plagiarism, to how they represent children’s voices in their narratives, to how they should cover an event that directly affects their news organizations.

In Chapter 2.1, Jannie Møller Hartley, Maria Bendix Wittchen, and Mark Blach-Ørsten describe the case of a Danish freelancer who faced accusations of plagiarism and around whom journalists and the public debated norms of attribution and inspiration, grasping to identify the boundaries of ethical journalistic practice. Shifting from a focus on journalists to the sources they cover, Jeanna Sybert considers in Chapter 2.2 the role of children in news narratives about war and conflict. Sybert focuses on Omran Daqneesh, whose image captured the public’s attention in 2016 during the peak of the conflict in Aleppo, and Bana al-Abed, who created a Twitter account with her mother to chronicle life in the city. Sybert’s analysis raises important considerations about the ways that journalists rely on children to reinforce and perpetuate Western notions and ideals as well as the potential for digital media in offering them agency and a voice within news discourses. In Chapter 2.3, Linards Udris, Mark Eisenegger, Daniel Vogler, Andrea Häuptli, and Lisa Schwaiger examine how news media covered the “No Billag” initiative in Switzerland, which would have abolished the licensing fee for public service broadcasters. Their analysis reveals the ways journalistic self-interest can shape news narratives, which may lessen the ability of outlets to engage with the global context of policy discussions and, consequently, hinder the public’s understanding of these issues.

The next three chapters focus on how journalists navigated external influences on and threats to their work, in the form of state repression, injustice, and violent attacks. In Chapter 2.4, Irene Awino explores Kenyan journalists’ unprecedented engagement with the country’s Truth, Reconciliation, and Justice Commission and how journalists publicly renegotiated their role amid a nationwide effort toward healing and reconciliation. Awino calls for critical journalistic reflective truth-telling in transitional societies as a means of upholding journalistic integrity against a backdrop of state pressure. In Chapter 2.5, Manuel Chavez investigates the strategies that journalists covering Mexico’s drug war relied on to protect themselves amid threats and attacks from cartels, politicians, public officials, and others. Although the journalists were reluctant to adopt these practices, which included self-censorship, avoiding reporting on violence, and anonymizing bylines, they were deemed necessary to ensure their safety while they informed the public about the causes and implications of drug violence.

In Chapter 2.6, Florence Madenga looks at the Rwandan genocide as a critical incident and combines insights from scholarship on Rwandan and foreign journalists and accounts from journalists themselves to assess what this community has learned from the tragedy. Her chapter also touches on how international journalists reflected on their role in keeping the genocide unchecked for many years. This section concludes with Chapter 2.7, where Rafael Grohmann, Felipe Moura de
Oliveira, and Moreno Osorio focus on a case where journalists got it all wrong—and how the impact of that mistake continues to haunt them in Brazil. Their chapter documents how media self-interest came in the form of sensationalism in media coverage, which, in the case of Brazil’s Escola Base coverage, amplified false accusations against owners of an elementary school and prompted conversations around sourcing, accuracy, objectivity, and the dangers of pack journalism.

Section III (Communities Engaging in Interpretation) brings together different levels of reflection, demonstrating how critical incidents can activate internalizations and discourses from a range of interpretive communities that can extend beyond those of journalists. These reflections can arise within an individual journalist, involve a community of journalists marked by sub-spheres of interpretation, or occur across journalistic communities in many parts of the world. This section also explores how communities of non-journalists take part in reflecting about the hows and whys of journalism. In Chapter 3.1, Maria Diosa Labiste explores how award-winning photographers who covered the drug war in the Philippines under President Rodrigo Duterte engaged in auto analysis as a reflective process. United by their experience of covering the brutal drug war, these photojournalists engaged in public self-reflection, where they questioned some of the norms that they used to follow in their work. But journalists and the news organizations they represent do not always see eye to eye, especially when faced with divisive issues. In Chapter 3.2, Binakuromo Ogbebor explores sub-interpretive spheres around the News of the World phone hacking scandal in the UK as news organizations deliberated on efforts to establish successful press regulation while protecting press freedom. Ogbebor finds that the discourse in response to the scandal spurred two sub-interpretive spheres in which one group of newspapers advocated for press self-regulation without state interference, while The Guardian singularly emphasized a social-democratic response, reinforcing that even within a single platform within a single press system, multiple interpretive communities can emerge with uneven power dynamics.

In Chapter 3.3, Xu “James” Zhang and Joy Jenkins explore journalistic reflection involving journalists across different countries and media contexts. Focusing on the pro-democracy protests in Hong Kong, they assess both Chinese- and English-language coverage from outlets around the world, considering the way attacks against journalists have been framed and what these narratives reveal about how journalists from both independent and state-owned outlets define the boundaries of legitimate journalism and its societal role while forming competing interpretive communities around issues of autonomy, authority, and press freedom.

The final two chapters in this section consider communities of peripheral actors who engage in reflection about journalism. In Chapter 3.4, Glenda Cooper uses Save the Children UK’s 2010 #blogladess campaign and successive initiatives to explore how aid agencies ceded narrative control to citizen content generators, in this case “mummy bloggers,” to ultimately catch the attention of traditional journalists. The campaigns resulted in heightened awareness and narratives that deviated from journalistic norms while challenging agencies’ reliance on legacy news organizations to cover humanitarian crises. Similarly, in Chapter 3.5, Matthew Chew
and Edson C. Tandoc Jr. examine how social media users reflected on the livestreaming of the 2019 Christchurch shooting in New Zealand. Their analysis of 1,900 comments on a Reddit thread about whether to share the #Christchurch footage raised questions around social media users’ roles as gatekeepers of content, including freedom of information versus press censorship, escapism versus realism, and who should hold regulatory responsibility.

The final section of the book (Section IV: Consequences of Critical Incidents) explores the question of what comes out of a critical incident. These four chapters notably understand critical incidents through their consequences (or lack thereof). In Chapter 4.1, Maria Konow-Lund and Eva-Karin Olsson demonstrate how the Charlie Hebdo terror attack in France, where journalists working for the satirical magazine perished, led to the founding of Forbidden Stories, a platform marked by an unprecedented degree of cross-border collaboration and cooperation among fellow investigative journalists. Konow-Lund and Olsson illustrate how collaboration and solidarity can come out of a critical incident. In Chapter 4.2, Thomas Birkner and Sebastian Mallek take a similarly consequence-based approach in presenting the case of “the Spiegel Affair” and how the conduct of the famous newspaper changed state-press relations in post-World War Two Germany.

In Chapter 4.3, Hanan Badr examines the Tahrir Revolution as a critical incident whose implications continue to shape politics and media in Egypt. Badr argues that the revolution spurred a continuous process of self-reflection among journalists rather than an immediate response. The section closes with Chapter 4.4, where David Nolan and Lisa Waller propose a conceptually provocative idea, that of an uncritical incident. What if, they ask, an incident ought to be treated as critical but ultimately is not? What if an incident ought to have wide ripple effects throughout journalism but ultimately does not? Nolan and Waller illustrate the potential limits of the critical incidents framework and give researchers much to consider.

These chapters, providing case studies of critical incidents from a range of media contexts, answer many questions and raise some more. In an epilogue written by the editors, we attempt to bring these chapters together and, in the process, propose a roadmap for how critical incidents in journalism can be studied. Our editor-authored conclusion (Chapter 5) attempts to identify lessons we have learned from studies of how journalists discursively reflected about critical incidents as well as lessons we have learned about how we can systematically study a critical incident in journalism. In a period when journalism is under different forms of attack and faces challenges across multiple fronts, journalistic introspection is needed more than ever. This book seeks to demonstrate why studying critical incidents in journalism is important, as well as propose ways to study such important incidents systematically, suggesting how we can approach pivotal moments in journalism. Specifically, we identify a discourse-centric approach that emphasizes what journalists say and a consequence-centric approach that emphasizes what journalists do. We situate these approaches within larger traditions of inquiry in journalism studies and identify the empirical referents necessary for the execution of empirical research in this area.
We also discuss the role of temporality and contextuality in theorizing critical incidents, as well as the potential in studying the antecedents to critical incidents. We conclude the chapter, and the book, with thoughts on the continued relevance of critical incidents for journalism and journalism studies.

References


SECTION I
Conceptualizing Critical Incidents
1.1

CRITICAL INCIDENT AS A CONSTRUCT IN JOURNALISM STUDIES

Paul D’Angelo

Critical incident is a pivotal construct in some of the vibrant research programs in journalism studies. Constructs are important in systematic approaches to journalism research because they designate dimensions of concepts that are useful by virtue of their causal efficacy—that is, their consequences—in real-world processes (Pavitt, 1999). Being a construct, critical incident does not indicate a theoretical framework. Nor do related constructs, such as key event or non-routine event. Rather, these constructs are embedded within theoretical frameworks of research programs on news waves and media hype (Elmelund-Præstekær & Wien, 2008; Kepplinger & Habermeier, 1995), paradigm repair and boundary work (Bennett et al., 1985; Berkowitz, 2000; Carlson & Berkowitz, 2014; Hindman, 2005), news icons (Bennett & Lawrence, 1995; Lawrence, 1996; Lee et al., 2011), interpretive communities (Brewin, 1999; Jenkins & Tandoc, 2017; Zelizer, 1993), and mediatization (D’Angelo & Esser, 2014; Esser & Strömbäck, 2014).

In elevating critical incident to a construct, academics can probe the hows and whys of journalism. Journalists usually try to stay at arm’s length from academic constructs about journalism—and, in this case, for good reason. Critical incident and kindred constructs act as levers through which academics have wedged the ideas of two related meta-theories, social constructivism and critical realism, into the world of journalism. These constructs give academics a toehold to explore how journalists and other social actors understand journalism’s processes, its socio-political significance, and its involvement in public affairs. Put another way, critical incident and related constructs have been invaluable in helping academics understand and critique journalism’s cultural authority to pilot a society’s information ecosystems, participate in its political institutions, and draw and defend its boundaries in current circumstances of fast-moving technological developments.

This chapter discusses how critical incident and related constructs are defined and used in ongoing research programs in journalism studies. Its thesis is this: In
building and working in these research programs, journalism theorists and researchers drew upon and continue to extend two definitions of critical incident developed in foundational work during the 1970s by Tuchman (1978) and Molotch and Lester (1974). The chapter discusses these foundational definitions next, and then it explains how critical incident is defined and used in relation to paradigm repair, interpretive communities, and news icons.

**Foundational definitions of critical incident**

To begin to see when and why critical incident became such an important construct in journalism studies, it is important to remember that scholars have long theorized about how journalists find information, verify facts, and encode facts into truthful accounts within news stories. Ekström and Westlund (2019) point out that recent meta-theory on these epistemological dimensions was rejuvenated in light of sweeping society-wide developments, including a cascade of technological changes that, according to Lewis and Zamith (2017), have “made a mess of what we thought we knew about journalism” (p. 111). This meta-theory is called critical realism. Critical realism articulates a moderate view of social constructivism, whose basic premise—“journalists not only report reality but also create it” (Schudson, 2011, p. xiv)—laid the groundwork for how the critical incident construct entered journalism studies.

News “is not identical with the event; it is something perceived after the event”, stated Wilbur Schramm (1949, emphasis in original). Forecasting constructivism, he continued: “[News] is an attempt to reconstruct the essential framework of the event – essential being defined against a frame of reference which is calculated to make the event meaningful to the reader” (p. 229). Taking into consideration that mid-20th century journalism around the world was changing (Schudson, 2013), none of these views would have been seriously upsetting to journalists who busily applied routines (e.g., direct observation; news beats) and ideas (e.g., verification; objectivity) in order to process information into news (Westlund & Ekström, 2020). Soon, however, these routines and ideas would become the object of sustained scrutiny.

One motivation for scrutiny was the conceit that news is a mirror of events and that stories are “not the product of decisions within an organization but fixed by some external reality” (Epstein, 1973, p. 13). For example, in criticizing journalism’s “graphic realism” encoded in the inverted pyramid and underwritten by objectivity, Phillips (1976) argued that journalists end up “apprehending ‘reality’ in small pieces” (p. 90). Another motivation concerned the perception that mainstream news organizations, and television news in particular, created and at times distorted the issue environment of significant occurrences (e.g., Gitlin, 1980; Glasgow University Media Group, 1976). Thus, sustained scholarly interest in events, occurrences, and incidents deemed relevant to journalism practice happened at a time when observers thought the consequences of naïve realism in newsrooms were too great to ignore.
Enter Tuchman (1978), who had been observing newsrooms using an analytical approach based in interpretive sociology. Rather than their behaviors being determined by structures, she argued, journalists flexibly and creatively enact newsroom conventions and routines. In other words, news workers invoke routines instantiated in organizational structures in order to transform occurrences into news. “What I mean to suggest is that news imparts to occurrences their public character as it transforms mere happenings into publicly discussable events,” Tuchman (1978) said (p. 3, emphasis in original).

Tuchman (1978) discovered that newsrooms deal with the glut of occurrences through two sets of framing routines: (a) a “news net” that demarcates places where journalists are supposed to find facts; and (b) categories of news forms (re: spot, continuing, and developing) tethered to “typifications” based on time (non-scheduled, pre-scheduled, and unscheduled events) and content (e.g., stock narrative themes, tropes, cultural notions). She did not use the term “critical incident,” but her explanation of how news organizations respond to unplanned occurrences laid important groundwork for how the construct would be defined and used in ensuing research programs. “Inaccurately predicted events—as-news require major unplanned alterations in work processes,” Tuchman (1978) observed (p. 59). While an occurrence’s attributes and news values trigger these “what-a-stories,” what mattered more was why newsrooms quickly marshaled all of the framing routines to cover it. “That newswriters typify these events emphasizes the centrality of typification in their work and the degree to which typifications are constituted in their work” (p. 60). With these words, Tuchman converted the point Schramm had made before into a formative definition of what scholars would later call a “critical incident”—namely, a critical incident starts when a real event interrupts news routines enough that journalists respond with strategies that aim to “repair” the news net.

It is no wonder that in six key pages (pp. 58–63), Making News clarified why news organizations are stymied from illuminating social and political conditions, even when covering a “what-a-story” gives them that opportunity (Berkowitz, 2000). Tuchman showed that critical incidents are a microcosm for why news organizations are bureaucratically hamstring by a deep ideological investment in status quo views, concluding that “news…is a social resource whose construction limits an analytic understanding of contemporary life” (p. 215; see also Gitlin, 1980).

Like Tuchman, Molotch and Lester (1974) postulated that journalists transform occurrences in order to make news. However, starting from the same premise—that occurrences are real but news is a social construction—they characterized this transformation in terms of news as purposive behavior rather than news as framing. Seen as news assemblers, journalists work with materials provided by news promoters whose own purposes for “promoting occurrences to the status of public events”—what Molotch and Lester (1974) called “event needs” (p. 105)—impact how incidental occurrences become newsworthy events. Even news consumers play a distinctive role in what they call the “career line of public events.” But because journalists can
directly open up and close off possible meanings, they take the lead in “making experience for great numbers of people” (p. 103).

Based on these ideas, Molotch and Lester (1974) explicated critical incident vis-à-vis two types of occurrences that become “critical” via ensuing strategies of discourse production. First, there are accidents. In these instances, “the underlying happening is not intentional [and] those who promote it as a public event are different from those whose activity brought the event about” (p. 109). Next, there are scandals. In these instances, an occurrence becomes a “public event” through the behaviors of informers who “for one reason or another do not share the event-making strategies of the occurrence effectors” (p. 110). In constructing accidents and scandals (which can stimulate accidents—see p. 110), agents set in motion concerted “attempts [to] restore traditional meanings” (p. 109). In Molotch and Lester’s interpretation of constructivism, a critical incident is characterized by cross-cutting messages that each agent employs to serve its own event-structuring needs. Analytically, a critical incident “constitute[s] a crucial resource for the empirical study of event-structuring processes” (p. 109, emphasis in original).

Ekström and Westlund (2019) noted that, “From Tuchman’s seminal study up to today, scholars have had the ambition to understand news production in a social context, without falling into the dead end of radical constructivism” (p. 4). By “suspending belief that an objective world exists to be reported,” Molotch and Lester (1974, p. 101) probably veered in that direction more so than Tuchman. Still, both theorists flipped the script on journalism. Journalists may be comfortable with routines and ideas that guide how they make news, but the idea that news stories construct reality was—and remains—a provocative view of their professional practice.2

Paradigm repair research on critical incidents

Researchers soon pushed the constructivist envelope further by adjusting the foundational meanings of critical incident. Bennett, Gressett, and Haltom (1985) focused on a “problematic story that slips through a journalistic gate” (p. 322). The “problematic story” stemmed from real events in which a television news station was perceived to participate by virtue of questionable behavior. Those events started with a telephone call to a TV news station in Anniston, Alabama, in early March 1983, in which the caller said he was going to self-immolate that night as a public protest of unemployment in the United States. The station alerted the police, sent a camera crew to the scene, and after a delay of an hour (during which time the police left the scene), the crew began filming the man as he lit himself on fire. Perceiving the perversity of filming a burning man for the sake of a TV news story, the crew stopped filming after 37 seconds and tried to help him. “What began as a routine ‘officials respond to deviant behavior’ story broke loose and entered the news world on its own terms” (Bennett et al., 1985, p. 328).

Building on Tuchman’s notion of “repair work,” Bennett et al. (1985) theorized that journalists can participate, intentionally or unintentionally, in a problematic
occurrence by virtue of breaching newsroom routines and guiding ideas. As they would do with any “what-a-story,” news organizations hasten to cover these occurrences. The outcomes, though, are usually institutionally driven discourses that chastise offending organizations and/or individuals but legitimate newsroom routines, which this research program bundles into a “paradigm of objectivity.” Bennett et al. (1985) speculated that news organizations near and far, and in some cases, worldwide, cannot resist covering these stories, thereby perpetuating paradigm repair.

Taking Molotch and Lester’s (1974) definition of critical incident into account, the variant, process-oriented definition of critical incident in paradigm repair research is as follows: a critical incident is incited by an occurrence made scandalous by virtue of journalistic misdeeds and/or ethical lapses that news organizations must subsequently promote as an accident. The “informers” of these occurrences could be a range of actors, including enterprising journalists. In the end, though, it is the response—repairing the paradigm—that makes the incident “critical.”

Bennett et al. (1985) proposed a “cumulative case study approach” for work on paradigm repair (p. 325). Subsequent researchers identified myriad occurrences that implicated deviant news norms in the story, including the O. J. Simpson trial (Hindman, 1999), the Jayson Blair plagiarism scandal at The New York Times (Hindman, 2005), and the death of Princess Diana (Berkowitz, 2000). These and other studies identified three discursive strategies—self-policing, self-criticism, and self-analysis—that news organizations employed defensively in an attempt to construct a critical incident as an accident.

Self-policing can be accomplished by “isolating the people or organizations that stray from the rest of the news media institution” (Berkowitz, 2000, p. 126), such as tabloid journalists (Pauly, 1988), paparazzi (Hindman, 2003), and for the print media, television journalists (Frank, 2003). Zelizer (1997) argued that journalists use colleagues or former journalists as primary sources to criticize, analyze, or police the press, all in an effort to persuade the public that news is capable of self-correction. Journalists will even elicit comments about the news media from ordinary people “whose lives are affected by the news media presence” (Frank, 2003, p. 449) in order to construct an incident as an accident. Of course, scholarship critically assessed these and other discursive strategies. For example, Bishop (2001) speculated that self-policing is “the ultimate pseudo-event,” a means to deceptively sway the audience to “regain its faith in journalism,” not an attempt to “truly … police their craft” (p. 23).

During this time, research on journalists’ strategic use of reflexive metacoverage paralleled paradigm repair research, with equal parts description and criticism (see, e.g., Eason, 1986; Levy, 1981; Lule, 1992; Reese, 1990). During this period, too, scholarly work extended the parameters of problematic occurrences to institutional settings, such as business dealings and sexual scandals within newsrooms and news companies. In the past two decades or so, some researchers have transitioned the paradigm repair framework toward processes of boundary work, collective memory, and interpretive communities. Accordingly, the definition of journalistic
incidents shifted somewhat, downplaying journalistic participation via deviancy and emphasizing defensive patrol of journalism by legitimate(d) media organizations. For example, occurrences pertaining to WikiLeaks became an important incident via sustained mainstream media boundary work (Coddington, 2012; Hindman & Thomas, 2014). These studies and similar studies focused on events, occurrences, and incidents relevant to journalism that can be classified under the critical incident construct.

Critical events in the framework of interpretive community

Work on interpretive communities commenced during the formative stage of work on paradigm repair when Zelizer (1990, 1992, 1993) couched the critical incident 3 construct in the temporal phases of past and present. Because journalists invoke a “shared past” in order to “collectively [make] sense of” current practice (Zelizer, 1993, pp. 218–219), academics can look to “key events in the annals of journalism” (p. 224) in order to observe this process via “double-time” discourses in the local and durational modes of interpretation. In line with the constructivist roots of critical incident, which Zelizer alludes to in several spots, the main idea is this: the process by which journalists had constructed a critical incident in the past can be, and often is, used to construct a critical incident in the present. Elaborated, a critical incident refers to an emblematic event from the past whose documentary record of metajournalistic discourses is invoked by journalists when their coverage of contemporaneous occurrences raises concerns about journalistic routines and best practices from working professionals in newsrooms and/or from other actors and agencies that disseminate information outside of journalism’s professional boundaries.

The elaborated definition of critical incident can be explained via three sub-processes. First, journalists invoke discourses from past key events that they consider to be emblematic of: (a) a place where significant, decisive incidents happened (or continue to happen), (b) a distinctive time period full of real events that happened already and which might still be unfolding, and (c) a consequential issue or set of issues engendered by (or still arising out of) real events. For example, Zelizer (1993) noted that discourses about how news organizations covered the Vietnam War—a place, a time period, and a set of political issues with eventful consequences—later guided Gulf War narratives about journalism’s changing circumstances now that audiences could see live coverage of war scenes. Theorizing events as emblems is a function of what constructivism would affirm and what critical realism confirms: that although real occurrences are encased in the emblematic event (e.g., actual battles in the Vietnam War), the key event is a social construction. Thus, in describing “key event[s] in the annals of journalism,” Zelizer (1993) noted, “The incidents do not necessarily exist ‘objectively,’ but … are projections of the individuals and groups who give them meaning in discourse” (p. 224).

Second, interpretive communities using the local and durational modes also construct critical incidents within an ongoing, or “running,” present. Journalists are
normatively attentive in the present to which occurrences matter to journalism, and why. “Already, at the time of occurrence, then, [an] event is filtered for its value in setting up and maintaining standards of action” (Zelizer, 1993, p. 225). For example, Zelizer observed that discourse about reporters Bob Woodward and Carl Bernstein “moved the story of Watergate from a particularistic discussion of sourcing techniques to discourse about a broader continuum of journalistic practice that pivoted on investigative reporting” (p. 228).

Third, in the running present, interpretive communities focus on emblematic events from the past to instrumentally and ideologically construct critical incidents in the present. This sub-process leads straight to the foundational definitions of critical incident, both of which draw out the instrumental and ideological implications of journalistic responses. Within the theoretical framework of interpretive community, these responses mark journalism’s professional boundaries and affirm its cultural authority in a society’s knowledge-building ecosystem. As Zelizer (1993) declared, “viewing journalism as an interpretive community … offers a way to analyze journalistic authority for events through simultaneous accommodation of two temporal positions, thereby enlarging the boundaries of their collective authority and the community this engenders” (p. 224).

Since Zelizer’s foundational work, researchers have focused on the running present to observe how one or more communities (co-)construct a critical incident by interpreting the political, economic, social, and technological conditions in which they operate. Real occurrences still matter, but they are rarely theorized as being embedded within emblematic events from the past. Rather, they are: (a) set in the foreground, as real-life settings for the conditions in which interpretive communities construct a critical incident, or (b) set in the background, as occurrences embedded within conditions in which interpretive communities construct a critical incident. Either way, this work recognizes that multiple communities of journalistic actors can potentially interact with one another in real life. In articulating, defending, and negotiating the meaning and boundaries of journalism, these interpretive communities co-construct critical incidents, often contentiously.

Foregrounding 1996 election campaigns in North Carolina, Brewin (1999) investigated a clash of interpretive communities that took place in a volatile political environment and churning information ecosystem. He observed metacoverage in The New York Times and The New Yorker that criticized Your Voice, Your Vote, a local media experiment in public journalism, for blurring boundaries between audience and journalist. Both groups engaged in a “communal effort on how to respond to an event” (p. 226, emphasis in original) without resolving their differing views of journalism’s roles. Thus, real events—the political races—staged the conditions in which competing interpretive communities co-constructed a critical event.

Some studies foreground real events within technological developments and changes that, as noted earlier, have been disruptive to journalists and news industries. Yet, abetted by technology, interpretive communities sometimes construct critical incidents cooperatively. For example, Mourão (2015) explored Twitter use
during one of the 2012 US presidential debates. Within this political setting, replete with opportunities for journalists and audiences to talk about politics and engage one another digitally via social media, she found that journalists routinely gave erstwhile audience members—theirself an interpretive community in part because of social media—a wider voice. “Twitter was used as a channel where reporters came together to construct meanings for a specific political event” (p. 1108). In the same vein, Jenkins and Tandoc (2017) examined reader comments posted shortly after Rolling Stone published a cover photograph of one of the 2013 Boston Marathon bombers. In co-constructing this event—that is, the race and the cover story—as being “critical,” the audience “participated in the ongoing boundary work in the journalistic field, joining journalism’s interpretive community in defining professional roles, norms, and routines” (p. 281).

Other studies relegate real occurrences into the background, embedding them in conditions that interpretive communities use to co-construct critical incidents. Paradoxically, these studies characterize the critical incident construct as removed from real-world occurrences. For example, referring directly to few real occurrences, Gutsche (2014) focused on how interpretive communities form in the social and political environments of the places their participants live and work in. Again, rarely referring to occurrences, Carpenter and Sosale (2019) examined how language of origin served as a criterion for journalists’ interpretations of the political roles of the Jakarta Post, Indonesia’s largest English-language news outlet. Finally, Robinson and DeShano (2011) examined discourses from mainstream journalists and citizen journalist bloggers in Madison, Wisconsin. They theorized that these different groups potentially held the same values of social responsibility, professionalism, and access to information. They found that some bloggers and reporters had begun to form an “adaptive organization of information producers” (p. 963) in which “journalists were incorporating citizen writing into production routines” (p. 978).

**News icons and critical incidents**

Bennett and Lawrence (1995) developed the theoretical framework for a news icon shortly after Zelizer (1993) elaborated the theory of journalistic interpretive communities. The news icon research program also characterizes a critical incident in relation to real occurrences and discursive responses. However, here, the responses are encoded as framing strategies in news stories. According to Bennett and Lawrence (1995), “a news icon … is a powerful condensational image, arising out of a news event, that evokes primary cultural themes and … contradictions and tensions” (p. 22, emphasis added). A news icon “emerges when an ongoing news story is crystallized in a dramatic event” (p. 23, emphasis added). These explanations adumbrate how a news icon fits into the constructivist meaning of a critical event: the raw material of real events, transformed by routines into news (“arising out of a news event”), are constructed into critical incidents through discourse (“… story is crystallized in a dramatic event”).
The news icon research program is somewhat distinctive because it highlights the role visual images play in the construction of a critical incident. Bennett and Lawrence (1995) suggested that dramatic visual images, photographic or moving, are often the impetus journalists need to transform what has already been transformed—the written modalities of news that happen after events—into a different kind of story. In these instances, a visual image can punctuate continuing coverage. Think here of coverage of President George H. W. Bush when he vomited in public during a 1992 trade mission to Japan (Dahl & Bennett, 1996) or of how two photographs, shared on social media platforms, instantly refracted the ongoing story of the 2015 European refugee crisis (Mortensen, 2016). Alternatively, an image or images may prompt a new story or re-awaken a nascent story. Think here of the coverage of leaked photographs of US military personnel mistreating and torturing prisoners at Abu Ghraib prison (Bennett et al., 2006) or of coverage of the videotaped beating of Rodney King (Lawrence, 1996).

In all these instances, journalists start with an ontologically enriched package that contains real occurrences indexically linked to realistic visuals in the spoken and written modalities of actual news items (if the story has already begun). Sometimes these raw materials spark a “what-a-story” and news cycles swiftly pivot towards them (e.g., the Abu Ghraib photos dominated US news media and captivated news media around the world). Other times the raw materials are less intrinsically dramatic, piquing the attention of journalists locally or nationally without spurring the newsroom hubbub of a “what-a-story” (Bennett & Lawrence, 1995). Offering a different twist on work on interpretive communities, a news icon resembles an emblematic event, only here journalists encode the emblem in news coverage to shape an issue culture.

Similar to the other research programs, a critical incident-qua-news icon is defined in relation to journalistic responses. Here, a critical incident refers to: (a) an emblematic representation of an issue culture that journalists construct out of real occurrences, realistic visuals, and news items that (b) they then use to present, adjudicate, and frame facts in continuing coverage of a story’s event-based issue culture. Accordingly, covering a story as a news icon allows journalists to “introduce symbolism of social change into evolving news narratives,” according to Bennett and Lawrence (1995, p. 22), who added that news icons “provide [journalists with] symbolic tools for the potential reshaping of political culture and public policy” (p. 26). Similar to a critical incident in interpretive communities, news icons provide journalists with discursive polestars to look back on when stories drift into other areas in the future (see, e.g., Lee et al., 2011). Given that similarity, it is difficult to see why these research programs never quite connected (cf. D’Angelo, 2019).

**Conclusion**

*Critical incident* is a vitally important construct in research programs in journalism studies. This chapter has explained some of the ways that this construct is defined and used in several of its research programs, including paradigm repair and its
relatives, interpretive communities, and news icons. The extraordinary versatility of the construct extends to research programs not covered here as well, including mediatization (with its close theoretical connection to work on media politics) and news waves (with its close connection to the pseudo-events construct). Even as the definition of critical incident shifts and evolves in these frameworks, all of the variations share common meta-theoretical roots in social constructivism, where critical incident is characterized by an amalgamation of real occurrences and the discourses journalistic actors use to construct reality.

In the spirit of constructivism’s purview of fostering a reflective approach to studying research objects, this chapter ends by reminding readers that using the critical incident construct provides an eminently useful way to keep dialoguing with journalism, our object of study. Paraphrasing Schudson (2018), we study journalism—we uncover its hidden discursive strategies; unlock its institutional secrets; determine its implications for a host of social issues and political processes—because it matters. Critical incidents in journalism have been invaluable in showing us how and why.

Notes
1 Like Tuchman, Molotch and Lester did not explicitly use the term “critical incident.”
2 Schudson has begun several chapters on the sociology of news production with an anecdote that makes this point. He also brings up this point in some of his other works—for example, in Why Democracies Need an Unlovable Press (Schudson, 2008), where he reminds academics that we, too, transform phenomena via theorizing and research.
3 Zelizer uses the terms “critical incident” and “key event” interchangeably to refer to the same construct. For example, she stated, “Journalists have long used critical incidents as a way to frame the hows and whys of journalistic practice,” (Zelizer, 1992, p. 67), later adding, “journalists as an interpretive community are united through their collective interpretations of key public events” (Zelizer, 1993, p. 223).

References


1.2

JOURNALISTIC CRITICAL INCIDENTS AS BOUNDARY MAKING AND THE MAKING OF BOUNDARIES AROUND CRITICAL INCIDENTS

Matt Carlson

In its allegiance to a set of institutionalized practices, journalism is an incredibly mundane activity. This is by design and by necessity, to routinize the unending stream of decisions enabling news production. Journalists have to decide on narrative structures, story frames, source selection, publication timing, visual presentation, and so on before a news story can appear. Such inbuilt mundaneness makes it all the more vital when, from time to time, a particular instance involving journalists rockets into public consciousness. Such moments are “critical incidents” in which a specific event achieves metacommunicative salience across the journalistic community and the public by bringing attention to the processes through which an event is turned into news (Zelizer, 1993). When attention to the workings of journalism spills over to normative questions about what journalism should be, what it needs to do differently, and how it should be defended, critical incidents become opportunities for scrutiny and considerations of journalistic practices, boundaries, and authority (Carlson, 2016a; Zelizer, 1992). In taking this broader view, critical incidents are conceptualized not merely as reactions but as constitutive in shaping collective understandings of journalism (Zelizer, 1993).

This chapter takes up this body of research on journalistic critical incidents with three goals in mind: establishing continuity by conceptualizing the main dimensions found in existing research; identifying the spaces for critical incident research; and addressing methodological issues for doing such research in the contemporary media environment. Doing so allows for better comparison across studies as well as a means for confronting methodological difficulties. The importance of this effort derives from the exigencies of journalism as an institutional activity increasingly subject to intense scrutiny, both externally via accusations of bias and shoddy practices and internally via debates over the forms and practices of news in light of the opportunities and pitfalls accompanying digital media and economic disruption. As journalism finds itself under the public microscope, journalism research must
continue to hone a conceptual framework that brings together discourse, interpretation, practice, and legitimacy. Drawing together work on critical incidents ties the concept more closely to other strands of journalism research that are commensurate with its central theoretical claims, including research on fields (Benson & Neveu, 2005), paradigm repair (Bennett et al., 1985), news controversies (Eason, 1988), boundaries (Carlson & Lewis, 2015; Lewis, 2012), and others.

This chapter begins by conceptualizing critical incidents broadly and connecting critical incidents to the concepts of metajournalistic discourse and boundary work. The next section examines seven dimensions of journalistic critical incident research as a way to conceptualize how decisions by both social actors and researchers shape what critical incidents look like. The second half shifts to a discussion of methodology by taking up questions of decisions that researchers make when selecting how to represent an incident in their studies.

**Defining a critical incident**

The term “critical incident” conjures an intuitive sense of its own meaning to indicate some occurrence or happening to be plucked out of the normal, unremarkable flow of everyday life. Colloquially, the word “incident” signals the importance of a discernible event taking place in a short time span and can be used as a shorthand marker for the event. But it also contains ambiguity that can be traced back to its Latin root, inādere, meaning “to fall on.” This etymological origin indicates the haziness of agency, causality, and blame bound up in how the word is used. The term “critical” has its own vagueness, as it may indicate a position of judgment and interpretation or something that is urgently important and/or essential. The medical use of “critical condition” to describe a heightened sense of peril compared to the less worrisome “stable condition” gets to the latter meaning. “Critical” also evokes critical theory, which Frankfurt School theorist Max Horkheimer (2002) uses to position theoretical work exposing structures of social and cultural dominance for the purposes of liberation in opposition to scientific theory as a functional means of explaining natural phenomena. Given this etymological breadth, defining what a critical incident is requires reining in its excess of meanings.

A starting point is to acknowledge how certain moments break from the unremarkable flow of routinized news reporting to become targets of public reflection on how journalism works in ways that then perpetuate shared cultural identity. This is the central insight that Barbie Zelizer makes with her introduction of the term in *Covering the Body* (Zelizer, 1992, p. 4). Drawing from Gerbner (1973), she develops the notion of critical incidents into a framework that foregrounds the community-making role of discourse that is then used to examine journalistic collective memory surrounding the assassination of US President John F. Kennedy in 1963. Zelizer (1993) further refines the critical incident concept in her article on journalism as an interpretive community. Rather than objective events, critical incidents “are projections of the individuals and groups who give them meaning in discourse. When employed discursively, critical incidents are chosen by people to
air, challenge, and negotiate their own boundaries of practices” (p. 224). She goes on to connect critical incidents to a moment of collective consciousness surrounding shared concerns among the journalistic community when “borders of appropriate practice need renegotiation.”

This approach gives journalism researchers a conceptual lens for examining how journalists strive to achieve and protect their authority. Extraordinary moments provide rich insights both for understanding such moments, but also for examining everyday reporting as well. Moreover, the interpretive communities approach adds theoretical heft to the study of critical incidents through providing both a methodological inclination toward the study of discourse about news and a conceptual framework for how this discourse is constitutive of journalistic communities. It is a reminder that discourse about journalism plays an ongoing role in journalistic authority: “Reporters use discourse to discuss, consider, and at times challenge the reigning consensus surrounding journalistic practice, facilitating their adaptation to changing technologies, changing circumstances, and the changing stature of newswork” (Zelizer, 1993, p. 233). These contextual elements are, arguably, the primary focus of journalism studies research.

Zelizer stresses how important these discourses are for collective identity. Revisiting her initial research, she writes: “interpretive strategies and the communities they legitimate continue to underscore how central collective interpretation remains in unifying reporters in their work and lending meaning and authority to journalism” (Zelizer, 2010, p. 181). The importance of this claim lies in how it extends the legitimation of journalism outward from its abstract norms or structures to the active discursive processes through which authority and collectivity are continually established or contested. The interpretation of critical incidents is not segregated to a particular moment but remains vital for broader understandings of journalism.

**Critical incidents and journalism’s boundaries**

The continual usefulness of the critical incident concept stems from the unique nature of journalists as public communicators. The product of journalistic work is, by definition, public. Journalists produce texts intended for public consumption, both because of a normative interest in providing information and awareness and an economic motive to increase revenue. These goals put journalism in an exposed position in which their practices face constant critique and require arguments to bolster their legitimacy (Carlson, 2017; Schudson & Anderson, 2009). Journalism’s publicness contributes to the attention that accrues when practices come under fire. At the same time, journalists are prominent public communicators. They control mediated venues in which they can speak to audiences about journalism and bring attention to news-related issues. The study of journalistic critical incidents recognizes this position and impels researchers to better understand the dynamics at play.

A way of understanding critical incidents as moments of intense scrutiny is through the lens of metajournalistic discourse (Carlson, 2016a). The main argument of the theory of metajournalistic discourse is that, on its own, any news text
would be unintelligible. Instead, the recognition of a news story requires shared understandings of what a news text is, how news conventions work as a form of knowledge, and how news texts relate to one another. News discourse is inseparable from this wide field of metajournalistic discourse as a site that provides meaning to the news while also being a terrain of contestation over what news is. There is no shortage of talk about the news, from informal ways in which we interact with and respond to news to more formal reviews of journalistic practices crafted for wide consumption.

If we take metajournalistic discourse to be necessary for news discourse to be intelligible, then we have to acknowledge that a core function of such discourse is to draw distinctions. Here is where research on journalistic boundary work helpfully directs attention to ongoing struggles over what may be deemed journalistically appropriate or inappropriate (Carlson & Lewis, 2015; Lewis, 2012). The study of journalistic boundaries locates its problem in a non-essential view of journalism. By accepting that journalism is not a natural “thing” but a fluid set of practices and norms, attention turns to how certain practices and norms are legitimated as acceptable or delegitimated as inappropriate. Boundaries are messy and uneven as they shift over time and across different cases. To speak of journalism’s boundaries is not to assume unanimity across an established field but instead to identify points of contestation, disagreement, and negotiation. Clearly, critical incidents become such moments where the boundaries of journalism become articulated in explicit, public ways. In this way, both metajournalistic discourse and boundary work lend some theoretical tools for analyzing how various actors respond in such incidents.

These same dynamics can be found in other strands of journalism research that foreground the discursive constitution of journalism in particular moments. These scholars share a focus on journalism as contested practice subject to internal and external critique (Dahlgren, 1992). Eason (1988) positions journalistic controversies as moments in which journalists confront the fragility of journalistic authority as they reassert their position. Similarly, paradigm repair (Bennett et al., 1985) suggests a recurring pattern in which controversies are reduced to individual-level malfeasance to ward off institutional-level (hence, paradigmatic) questions. What these approaches share is an interest in how journalistic practice is always contextually situated within larger discourse appraising how journalism works—or doesn’t work. Their similarities underscore the usefulness of particular moments when news practices come under intense scrutiny for spurring widespread attention to how journalism works.

Dimensions of journalistic critical incidents

The flexibility of the critical incidents concept lends itself for use in a variety of approaches and settings. Reining in this body of research to produce a framework for the study of journalistic critical incidents requires an analytical structure that is flexible enough to cover a variety of incidents yet is cohesive enough to be
meaningful as a framework. Being expansive and coherent involves finding balance, and one way to find this balance is to map out key dimensions and to systematize connections and distinctions across this research.

Following this aim, this section advances seven interlinking dimensions of critical incidents found within the research: incident origin, incident scale, location of discursive actors, level of interpretive agreement, incident cohesiveness, incident duration, and temporal distance. Each dimension is presented as a spectrum whose ends indicate opposing positions. The resulting dimensions can be used to position various studies in relation to others as a means of making their similarities and divergences readily apparent.

These dimensions help us understand what types of boundary work are occurring based on how a critical incident arises and how it is constructed as a critical incident. This construction has two parts, what various actors do and say in response to some particular event, and what choices the researchers make to study them. In short, the questions undergirding all of these dimensions are: How are critical incidents assembled? For what purpose?

**Incident origin**

The dimension of incident origin pertains to what triggers the elevation of a particular moment into the realm of critical incidents, arrayed from event-based to reporting-based. Event-based incidents are ones in which a particular news event is significant enough that attention to the event spills over to scrutiny regarding how the event has been reported. The stream of news coverage of a planned event (e.g., a major election) or an unplanned one (e.g., a terrorist attack) will include news stories analyzing the news media response, whether as critique or praise. Often, event-based critical incidents derive from an exceptional event—what Tuchman (1973, p. 126) calls “what-a-story”—to denote a news story of such impact that it disrupts or defies journalistic routines. These stories command public attention with a plethora of news stories that push aside other topics. They also defy routinized journalistic practices, challenging journalists to cover the unexpected. On one extreme, the assassination of US President John F. Kennedy would fall in this category (Zelizer, 1992). Similarly, Parameswaran (2006) examines how the September 11, 2001, attacks in New York and Washington, DC, became “a fertile discursive moment that precipitated debates on journalists’ identities, roles, and responsibilities” (p. 44). The global significance of the terrorist attack was unavoidable, which made it an important moment for journalistic self-examination.

On the other side of the spectrum, reporting-based incidents occur when journalists or their reportage—rather than the story being reported—becomes the focus of sustained attention and critique. Most notably, journalism scandals fall into this end of the spectrum. For example, the Janet Cooke scandal, in which a Washington Post reporter’s Pulitzer Prize-winning series was discovered to be fabricated, became a prominent story on its own about journalism, race, and gender (Eason, 1988). Sometimes reporting scandals become prominent political stories, such as
the *News of the World* phone-hacking scandal and the attendant Leveson Inquiry (Thomas & Finneman, 2014). Tandoc and Jenkins’ (2018) study of a controversy at the website Gawker over the publishing and subsequent withdrawal of a story about the private life of a magazine executive is another example of an examined reporting-centric critical incident. While not a politically or culturally important controversy, it was a *journalistically* important one for debates over journalistic standards in digital-native news outlets.

For researchers, the origin matters to the degree that journalists as actors are thrust into the reporting of a larger event or whether they instigate their placement as the main object of attention. The former points to the difficulties that journalists face in pursuing a normative position of being detached from the news they cover rather than being seen as actively producing partial accounts. Shining a light on reporting exposes the constructedness of news accounts striving to present an accurate picture of an event. The latter, when concerning news controversies, gets to the precariousness of journalistic representations even more acutely. This happens when individual journalists gain attention for malfeasance that calls into question the veracity of all reporting.

**Incident scale**

This dimension indicates the scale of the incident, both in terms of its resonance and the journalistic actors involved. At one end of the spectrum would be incidents that resonate across geographical contexts. This is true of much of the literature on critical incidents, as researchers often select cases that have accrued widespread attention and resulted in the production of ample responses to be analyzed. For example, Berkowitz (2000) looks at the role of the paparazzi in the car accident that killed Princess Diana in 1997. As an event, Diana’s death drew significant international interest surrounding the steps that resulted in the crash. Aggressive paparazzi photographers became part of this story, leading to broad reconsiderations of appropriate news reporting tactics and boundary questions about who ought to be considered a legitimate journalist well beyond the context of where the accident happened. But such global incidents are rare, which leads to an opposite consideration of events more restricted to a specific, localized context. Much news production happens on a smaller scale, but it is no less important in providing accounts that matter to the public. For example, Hess (2013) uses the critical incident framework to examine how smaller newsrooms that produce community-oriented news are adapting to a digital environment that often diminishes the significance of geographical location. Attending to this dynamic requires working at a more local level to identify issues that may not be readily apparent when operating at a broader scale. In the end, the dimension of incident scale is meant to spur consideration of the types of journalistic critical incidents that receive scholarly attention along with those that do not but deserve to be studied. It also identifies differences in the embeddedness of an incident in a particular context versus incidents that are universalized and rendered more detached from their context.
Location of discursive actors

Much of the research on journalistic critical incidents focuses on journalists as the key discursive actor. Journalists’ public utterances through news stories, the journalism industry trade press, public appearances, and memoirs receive the bulk of attention. But other studies include non-journalistic actors who speak from an external position about journalistic critical incidents. The inclusion of actors from different domains can highlight clashes, both in terms of the interpretations they produce and who is authorized to retell a story. Zelizer (1992) notes how JFK, Oliver Stone’s film on the Kennedy assassination, was assailed by journalists who had covered the assassination first-hand. By emphasizing the location of discursive actors included within a study, researchers can reflect on who gets to speak and who is absent. Or, put slightly different, which actors are within the boundaries of who speaks about the incident and who is on the outside? Such patterns require scrutiny.

Level of interpretive agreement

At their core, critical incidents are about the interpretation of events via public discourse seeking to make sense of why something occurred and what it means. This dimension questions the degree of consensus surrounding the meaning of a critical incident. On one end would be a consensus view. For example, views within the journalistic community toward “fake news” tended to coalesce around its negative implications with blame directed at the polarized political environment and rise of digital platforms as intermediaries (Tandoc et al., 2019). A contrasting case would be one in which the community fractures into competing interpretations. Instead of unanimity, the group becomes divided. This disagreement is illuminating for how and why people line up on opposing sides to tout their interpretation as correct. Such divisions push the researcher to ask who disagrees, on what grounds they base their disagreements, and how differing views connect to broader rifts.

Incident cohesiveness

Incidents are always constructs (a trait that will get more attention below), and how disparate discourses and actions are assembled into an identifiable incident varies. This dimension indicates the degree to which an incident is presented as a singular event versus whether it is an amalgamation of occurrences. An example of the former is the attack on the offices of the French satirical magazine Charlie Hebdo that killed 12 and became a flashpoint for discussions of acceptable speech and journalists’ security (Jenkins & Tandoc, 2019). While antecedents to the shootings can be traced, the actual shooting itself was a fixed incident. Many of the studies cited above also focus on a particular delimited event.

The other side of the spectrum moves away from singular events to more diffused targets. Feldman (2007) examines the satirical comedy program The Daily Show as a critical incident, noting, “discussions of The Daily Show and Jon Stewart
can be seen as a way for journalists to negotiate … the limitations of the profession’s historically constructed definitions of what journalism should or needs to be” (p. 407). As a phenomenon, the program’s satirizing of news routines generated robust conversation about the effectiveness of journalism. Similarly, Haas and Steiner (2002) broaden the view of critical incidents further by examining how many in journalism treated the public journalism movement in the 1990s as a scampergoat for the newspaper industry: “the entire movement has compelled critical self-reflection about journalism’s conditions of operation” (p. 326). Likewise, Tandoc, Jenkins, and Craft (2019) look at how journalists amalgamated disparate actions into the phenomenon of “fake news” as a way to support traditional journalism. On a more practice-based level, Martyn (2009) treats mobile journalism as a critical incident signaling the transformation of news work away from traditional media. These examples underscore the dexterity of the critical incident concept. They place the focus less on delimiting an event and more on tracking how actors draw on a range of occurrences for meaning-making.

**Incident duration**

Closely related to incident cohesiveness is the dimension of incident duration. On one end of the spectrum are more discrete events that are brief and occupy attention for a short period of time, such as the Charlie Hebdo attacks referenced above. Other events unfold on a slower time scale that occupies varying levels of attention over longer stretches of time. For example, journalists’ use of unnamed sources in covering the George W. Bush administration led to a series of interlinked-yet-separate critical incidents (Carlson, 2011). Any single incident may have been important, but their quick succession bolstered an ongoing conversation about journalistic practices and journalists’ relationships with elite political actors that lasted more than a year.

**Temporal distance**

A second dimension involving time is temporal distance, or the lag between when an incident occurs and when discourse about it is produced. Often, discourse is contemporaneous with a critical incident. A breaking scandal involving a journalist or news organization will be swiftly followed by condemnation or defense such that the reporting of the event is laden with its interpretation—they are not separate. Alternatively, critical incidents may be mediated through collective memory of past events. This is the sense in which it appears in Zelizer’s usage to refer to the Kennedy assassination (Zelizer, 1992) and to coverage of the McCarthy Era and Watergate (Schudson, 1992; Zelizer, 1993). Often, a contemporary event may touch off collective memory so that the discourse of a critical incident relies heavily on the past to make sense of the present (Carlson, 2014; Carlson & Berkowitz, 2012). Memory adds a temporal dimension to how critical incidents erect boundaries, calling attention to questions of continuity and change.
Journalistic critical incidents as methodology

Taken together, these dimensions present core differences that permeate the research on journalistic critical incidents. They help tame the variety of journalistic critical incidents by placing them in relation to others. These dimensions are meant to spur future research that will hopefully lead to refinements and proposals for additional ones. These dimensions are intended as spectra rather than dichotomies to encourage nuance and appreciation of cases that fall in between the extremes of each. The dimensions are also useful for thinking about areas where studies are lacking. Unoccupied ends of spectra or missing combinations indicate the need for new directions in critical incident research.

Journalistic critical incidents, as a way of revealing institutional behaviors and beliefs, mesh the conceptual with the methodological. A critical incident suggests a mode of inquiry necessary for assembling both actions that occurred and the traces of meaning-making that interpret these actions. The sections below consider some of the central issues that arise in researching journalistic critical incidents. The goal is not to dictate methodological orthodoxy but rather to elucidate important questions and considerations that should be taken up in the course of conducting or evaluating journalistic critical incident research. The act of researching journalism itself involves establishing boundaries of what will be included or excluded within a study. These decisions shape what findings can emerge—and which ones cannot.

Conducting journalistic critical incidents research

Much of the research on journalistic critical incidents utilizes qualitative methods for analyzing texts or discourses. This includes qualitative content analysis as a means of systematically analyzing a body of texts (Richardson, 2006). Many of these methodological forms follow the tenets of critical discourse analysis, especially the variants developed by Fairclough (2013) and Van Dijk (2013). What these approaches share is analytical movement beyond the text as an isolated artefact to consider the “discursive strategies of social actors” that they expose (Carvalho, 2008, p. 64). Broadly speaking, this perspective holds that language is not a neutral conduit of information, but an exercise in semantic power that shapes shared understandings of appropriate and inappropriate social relations. In this constructivist view, discursive choices matter for what they include and exclude. When applied to journalism, textual and discursive approaches systematically investigating news as a particular symbolic resource provide a meeting point between news production and consumption (Fürsich, 2009). Because discourse-centric methodologies are attuned to the power inherent in the creation and circulation of symbolic forms, they are well-suited to studying news and journalism.

Discourse is a notoriously ambiguous term, both conceptually and methodologically. It can be used minutely to indicate the interactions that constitute everyday social life, or it can be used expansively to indicate historically situated modes of
constructed reality. In journalistic critical incident research, discourse is usually delimited through its anchoring to a particular case study with identifiable contextual limits (Yin, 2009). Any particular case involves two primary decisions that shape what can be found. The first involves defining the temporality of the event by setting a beginning and ending date for a particular case. Doing so sets the parameters of what the researcher is able to see and analyze. These decisions affect the degree to which antecedents can be exposed or lasting resonances over time identified. A second decision pertains to building the necessary choices about inclusion and exclusion that go into building a corpus of texts. Part of corpus selection depends on source availability; print sources tend to be more easily retrievable, even if broadcast sources often draw larger audiences. This holds true for other forms of data, such as interviews, where selection choices and access issues shape findings. A related issue is developing a corpus of appropriate size so that it is both complete enough to provide saturation while also of a manageable scale for facilitating qualitative inquiry. Within the corpus, the researcher has to further evaluate the scale of any text to assess its audience and significance vis-à-vis other texts. This becomes difficult with the proliferation of digital texts.

**Reflexivity in journalistic critical incident research**

The premise that a journalistic critical incident matters requires accepting the ontological concreteness of the incident being studied. This is often assumed as incidents are regularly presented as existing *a priori*, with the researcher working to interpret how they were understood by participants and observers within a bounded temporal and geographical context. But making these assumptions explicit sheds light on the interpretive choices of the researcher, adding a layer of reflexivity to the study of critical incidents that considers how researchers construct an incident and how they place themselves within what is being researched. Macbeth (2001) usefully differentiates between “positional reflexivity” and “textual reflexivity” to tease out different forms that this process can take.

Positional reflexivity refers to the recognition of the researcher as embedded within the social structure. In examining contextualized practices and meaning-making, the researcher cannot stand as an objective observer, but comes to the work with various privileges and ideological predispositions. Recognition of the researcher’s position has been accentuated in anthropological research (Clifford & Marcus, 1986), but reflexivity is no less important in text-based analyses than it is in ethnographic research. One’s placement affects how one understands what is being studied. With journalism research, a special point of emphasis is the researcher’s position toward journalism’s normative commitments. What journalism *ought* to be in the mind of the researcher will certainly affect how the discourses of critical incidents are understood.

Textual reflexivity builds off positionality to indicate issues involved in the crafting of representations of other people. As Macbeth (2001) notes, the gap between the representation and the represented constrains representational aims.
The researcher’s voice is one among many. This is an acute issue in the production of discourse about discourse. As Phillips and Hardy (2002) note: “Academic discourse also constitutes a particular reality, and we are continuously challenged to retain a sensitivity to our role in the constitution of categories and frames that produce a reality of a particular sort” (p. 10). The researcher is not in an objective position, but actively involved in processing external events into a research project. The choices that are made in the process of doing research—what researchers select to emphasize and what to omit, how they create categories and draw conclusions—need to be understood as interpretive choices.

Among the methodological decisions the researcher must make in conducting an analysis of a journalistic critical incident, a principal one is setting boundaries for the incident. No incident can truly be isolated; they all exist within a complex array of pre-existing forces that converge in the moment being studied, and then continue to persist afterward. This is even more acute for incidents that are more diffuse across time or space (e.g., “fake news” on social media sites). In choosing to select an incident and then to declaim its boundaries for study is to construct how that incident is going to be understood. This is unavoidable; the researcher must make methodological choices. Even as the researcher takes an inductive approach that privileges an emic position over an etic one, boundaries of incidents and categorizations have to be imposed, to some degree, to establish order. These choices should be transparent and justified as consequential for shaping the findings that emerge.

An additional point of reflection regarding textual reflexivity concerns the exceptionality of how the researcher reads multiple texts. Most notably, the experience of meticulously scrutinizing a corpus of texts from a variety of sources is a peculiar one. Audience members, even those highly interested in a particular event, do not systematically access and analyze a thorough collection of texts on an incident, engaging in axial coding and categorization procedures. Yet it is imperative in studying an incident to have a sufficient-sized corpus to achieve a level of saturation enabling the identification of patterns and nuances across texts. In this sense, the experience of the researcher is not like the experience of the non-researcher—and we should be careful to recognize this departure, particularly in making assumptions about audiences. Nevertheless, it is an unavoidable situation for researchers. Reflecting on how texts are consumed beyond the researcher also helps spur interest into how to include the audience in journalistic critical incident research.

Ultimately, much of journalistic critical incident research is concerned with professional reflexivity in the face of some event that spurs reflection about the news. Scholars, too, need to reflect on the assumptions that go into this type of research and recognize how methodological decisions affect what they find. This does not equate to criticizing the journalistic critical incident framework, but a recognition of the contingencies of research design, and the need for careful and transparent methods. Methodological quandaries should not be swept under the rug if journalistic critical incident analysis is to further develop as a coherent body of research.
Journalistic critical incidents in the digital media era

The study of journalistic critical incidents as the study of discourse has long drawn on two primary sets of data—news reporting and the journalism trade press. In the predigital era, capturing a census—or near-census—of available content was often feasible. Gathering media content has always been difficult for some portions of the news media where texts are not always readily available, such as local television and radio. Digital media exacerbate journalistic critical incident sampling issues through their facilitation of more voices in mediated public communication. This ranges from the growth of digital news start-ups that publish stories about media and technology to social media as a venue for acts of everyday media criticism (Carlson, 2016c). Elite actors are also able to circumvent news channels to speak directly to the public, which can be used to further target news reporting (Carlson, 2016b). In sum, there is more out there to analyze.

For the researcher, the continuing imperative is to draw lines around a sample in systematic ways. This should include openly acknowledging the decisions made to winnow down a sample and why certain bodies of texts were included or excluded. Another component is recognizing the scale of various statements by noting their context. In digital spaces, a tweet from The New York Times with its 44 million followers can exist alongside a tweet from a non-journalist with very few followers. Spatially, they are equals in one’s feed, but their influence in the aggregate is not the same. What makes this more complicated is that even social media users with few followers and little apparent influence can have their messages amplified through processes like retweeting and reposting. Such dynamics need to be accounted for when dealing with a variety of sources in critical incident research. The one-to-many distribution channels of traditional media are augmented by less straightforward content flows curated by a variety of actors from journalists to algorithms to individuals (Thorson & Wells, 2015).

The digital media environment also provides new sources of data that can help push the scholarship on journalistic critical incidents forward. For example, in their study of Gawker’s decision to publish and then unpublish a story about a magazine executive and an escort, Tandoc and Jenkins (2018) include the audience through analyzing online comments at the end of news stories about the controversy. This decision recognizes the hybridity of digital news, particularly in a space like comments where the voice of the journalist encounters the voices of readers. Such digital traces provide new forms of evidence that can be brought into the research. This inclusion also forces scholars to address the abundance of texts, as news story comments can easily run into the hundreds on a controversial story. But it remains important to address how digital media weaken previous boundaries between who speaks publicly and who cannot.

In sum, the digital media environment complicates the study of journalistic critical incidents. A restricted cadre of news and trade press outlets has given way to a broader field of public communication, which further fragments attention to any issue or news outlet. Digital media consumption increasingly takes place through
mobile media in interstitial moments of everyday life. But the new dynamics of digital media also present many opportunities for new forms of evidence and communicative flows to be studied.

**Conclusion**

Researchers who study particular moments in journalism have long argued that such critical incidents matter for the constitution of journalism as a practice of providing accounts of society to society. News is, by definition, public, but journalistic critical incidents are particular moments of scrutiny. They highlight the mechanisms through which journalists support their legitimacy as well as bring to light failures or struggles that call into question assumptions about journalism. The hope of this chapter is that the framework discussed above provides both a degree of coherence to the work being done and a degree of flexibility to enable future research to push this area of research forward.

There is ample room for future research to fill in the gaps left to be explored, particularly as they become visible across the dimensions presented above. What is certain is that journalism’s social place, its means of achieving authority, its negotiation with new technological forms, its internal struggles over appropriate and inappropriate behaviors and shifting borders, and its entanglement with other centers of social power, will always remain in flux. Journalists’ discourses and practices will continue to deserve our attention, with the journalistic critical incident framework providing a way to assess the sensemaking and the practices that arise.

**References**


SECTION II

Characteristics of Journalistic Work
2.1

PEELING OR PLAGIARIZING? A DANISH MEDIA SCANDAL AS AN INCIDENT OF RE-INSTATING BOUNDARIES IN THE GREY ZONES OF “GOOD” JOURNALISTIC CITING PRACTICES

Jannie Møller Hartley, Maria Bendix Wittchen and Mark Blach-Ørsten

“How much can a journalist steal before it’s cheating?”

This question featured as the headline on a story about one of the most significant plagiarism scandals in Danish journalism: the scandal of Annegrethe Rasmussen, which broke out just before Christmas in 2015.

Stealing stories or elements of stories from competitors is not completely forbidden—it is rather a question of what, how much, and how you “steal.” In the ideal world of journalism, just posing the question is risky, as the answer to the question should surely be “a journalist must not steal at all,” but as this case shows, the journalistic practices of citing are far muddier than those of the ideal world, and the borders are very grey. In this chapter, we look at these grey zones by analyzing the scandal of Rasmussen, who was laid off from a number of freelance positions following accusations of plagiarism. This followed another scandal that same month involving the sports journalist Michael Qureshi—a case of not only plagiarism, but also of making up sources and interviews that had never taken place (Blach-Ørsten et al., 2018). In this specific incident, the actions of the journalist and columnist Rasmussen created a debate on the rules of so-called peeling, which refers to writing an article using multiple direct quotes from someone else’s work and attributing competing media in daily journalistic practice, and at the same time exposed contradictions between the dominant media ecology and the ideals of original journalism.

Rasmussen, who worked as a freelancer for the online political site Altinget, was accused of plagiarizing from The Economist in one of her articles, which spurred a number of investigations into her work and a debate about whether what she had done involved too much copying without attributing the source of information, and therefore could be characterized as plagiarism. This question, however, is not a
new one. As White (1989) notes, “it’s difficult for a journalist to know when lack of attribution suddenly is no longer lack of attribution, but plagiarism” (p. 267).

The debate surrounding the scandals went on for several months and was later said to be the most important media event in 2015, a year that was furthermore dubbed “the year of embarrassment for the news media industries” (Hornbek Toft, 2015, para. 3). Hence, this makes an interesting case for looking at citation practices as a site of boundary negotiation within Danish journalism. Gerbner (1973) coined the term “critical incident” in his discussion of decision-making processes in media organizations. He argued that critical incidents give organizational members a way to defuse challenges to recognized authority. For journalists, discourse about critical incidents suggests a way of attending to events that are instrumental for the continued well-being of the journalistic community (Zelizer, 1992). The case of Rasmussen can be seen as a critical incident, where themes in journalistic practice, such as attributing, referencing, citing, peeling, crediting, being inspired, rewriting, and plagiarism, were heavily discussed by the public and among journalists in particular. In this chapter, we seek to illustrate how such a negotiation took place, consider where the norms of how to attribute and cite were challenged by the specific reporter accused of plagiarism, and investigate the public debate that arose following the accusations.

Correct attribution and the ecology of citation

Two years before the incident, the rules, practices, and boundaries regarding “correct attribution” had already been under scrutiny. The Danish Ministry of Culture initiated a project aimed at making the rules of attribution clearer, which resulted in new guidelines. Following this debate, the private media association Danske Medier (Danish Media) developed new and detailed guidelines for “good attribution” practices in 2016, and they were revised again following years of debate and internal discussions in 2019. Furthermore, the Ministry commissioned a large scientific study of citation practices, which examined the amount of news articles where the journalist had cited another media organization in the story (Blach-Ørsten et al., 2013). The research showed that over 50 percent of all news articles in a given week mentioned another media outlet as the source of the story or as inspiration for the story and that the ecology of citation was primarily national. Previous research on digital news production has shown that it is an integrated and very common part of Danish news production to rewrite news or use other media’s original news stories to develop new angles (Brink Lund, 2002; Hartley, 2009, 2011).

From outside the Danish context, research has also shown that “making use of a competitor’s news is common in the news business, but usually some attempt is made to disguise it by re-writing” (Chaney, 1984, pp. 29–30, as quoted in White, 1989, p. 272). Another study has shown that attribution is used to “give strength to the material, when controversial statements are made, when a reporter is unsure of the credibility of the material, or when generalizations are made” (Mencher, 1984,
p. 43). Nevertheless, the specific rules seem unclear and undefined, although, when breached, journalists refer to “journalism ethics” and suggest that “re-writing is a common practice” in journalism (White 1989, p. 271). Karlsson (2011) and Blach-Orsten and Brink Lund (2015) argue that most of the practice of journalism is invisible before the final product appears, echoing Singer (2005), who labeled journalism as one of the opaquest industries. This means that cases related to the norms and practices of journalism are rarely discussed in public or even inside the newsroom, as they are implicit in journalistic work.

Paradigm disguise is a variant of paradigm repair, which is defined as a journalistic ritual to defend professional ideology. It “builds on that construct by explaining why journalists … are more willing to disclose plagiarism and dismiss offenders without evaluating whether the punishment fits the crime or addressing the situational influences that contributed to the plagiarism” (N. P. Lewis, 2008, p. 354). Thus, paradigm disguise has the specific purpose of hiding how actions of journalists might conflict with an ideal image of journalism, an ideal the journalistic institution wishes to uphold in public and within the field. Hence, the case of Annegrethe Rasmussen is an illustrative example of boundary work related to the unclear rules of how much citing, rewriting, and “stealing” is acceptable and an example of paradigm disguise, with the aim of keeping up the pretense of originality in journalism (N. P. Lewis, 2008). Analyzing 76 cases of plagiarism in the United States, Norman Lewis (2008) differentiates between four types of plagiarism: *appropriation plagiarism* (knowingly and repeatedly taking another’s work); *research plagiarism* (taking some words or research without attributing); *self-plagiarism* (recycling one’s own words with a different employer); and *idea plagiarism* (using an idea or concept from other people’s work). The Rasmussen scandal involved elements from the first, second, and fourth type of plagiarism. The correspondent admitted to using words and sentences from other people’s work without attributing, and she was accused of having done so repeatedly. As we shall see below, she also said that many of her stories were “inspired” by reading other people’s work. The discussion, which unfolded during 2015 and 2016 amid the accusations and the responses, questions what journalism is and what journalism is not, thereby negotiating the boundaries of originality in journalism. We examine this in the following section, presenting the analysis of the Rasmussen case.

**The grey zones of attribution: The case of Annegrethe Rasmussen**

The scandal originated when a reader of the online political news magazine *Altinget.dk* noted some similarities between a column written by freelance foreign correspondent Annegrethe Rasmussen and an editorial written by *The Economist*. This led to quick action by *Altinget*. On December 14, 2015, the editors of *Altinget.dk* analyzed the two different articles, and on December 16 they publicly accused Rasmussen of plagiarizing the idea and specific paragraphs from an article published by *The Economist*.
The similarities between the two texts are regrettable. As a minimum, there should have been a reference to *The Economist*. It is a violation of our ethical guidelines and we take it very seriously.

*(Nielsen, 2015, para. 5)*

The guidelines to which this editor refers are internal guidelines, which, in the Danish media system, supplement the national press’s ethical rules. In 1991 these rules were made a part of Danish law, as a part of the Media Liability Act (*Medicantsvarsloven*). Most news organizations in Denmark have signed up to the National Press Council (*Pressenævnet*); however, in the ethical guidelines there is no mention of how to cite or reference competing news organizations. Many news organizations, however, also have internal guidelines. In some cases, these are written down. But in others, they exist as a set of unspoken norms about how good journalism is done (Blach-Orsten et al., 2017). Norman Lewis (2008) notes that in the United States, many professional codes ignore the subject and that plagiarism is most often seen as an individual moral failure rather than a structural issue or simply part of everyday journalistic practices.

Following these initial accusations, the weekly newspaper *Weekendavisen* published an article with the headline “Recycled Paper,” comparing the sections in six of Rasmussen’s articles, finding similarities between her articles and several articles from *The Guardian* (Henningsen, 2015). The piece considered the situation article by article, line by line, stating how much is quoted and which articles lacked attribution. Rasmussen was asked to comment, replying that apart from one example, there are no errors from her side. Furthermore, she said that “to me it feels like a witch hunt.”

Rasmussen felt wrongly accused and defended herself in a long Facebook post that included the response she had sent to *Weekendavisen*. In this post, she provided links to eight different Google documents, finding only one place with no reference to the source of the information, and apologized. She noted in her post that the *Weekendavisen* violated the rules of sound press ethics by not letting her respond to the criticism before publishing the article about her. In the thread underneath the Facebook post, she continued her defense, maintaining her claims of being a victim of a character assassination. Article by article, she discussed the journalistic practices and the guidelines she was accused of violating. She used the practice of “peeling,” a part of everyday news work, to justify why what she had done was not a violation:

Now to a question of principles. In journalism we have a not very honored discipline (however good for the readers and those you also have to keep in mind) and that is “peeling”. You see a very good book and you think: “Yes! The readers need to know about this book too”. That’s how I felt when I read the 416-page book by Scott Stossel, editor of the renowned magazine *The Atlantic, My Age of Anxiety*, which is about the devastating anxiety he has experienced his whole life. So, this article is a bunch of quotes from the book,
tied together by a few sentences by me. And that is what we might call copying, but one which is agreed upon with the newspaper and declared.

(Rasmussen, 2015)

In the post, she admitted that her own work in this case was minimal but argued that it was ethically permissible, as it was a service to the readers. Furthermore, she let everyone know that this was “business as usual” in journalism. In relation to this case, the newspaper Information publicly announced that they have an internal guide specifying “how to peel” stories (Vaaben & Funch, 2015).

Rasmussen’s defense did not stop the criticism. Altinget.dk published their version of the incident on December 19, 2015, in which they let her know that they did not recognize her “version of the story,” thereby indirectly accusing her of lying. Altinget.dk started a larger investigation into 18 of her articles and in January 2016 concluded that while 10 of them had “no problems,” four were in a “grey zone,” and four were “breaking the rules of good citation practices” (Nielsen & Jerking, 2016).

Rasmussen was also freelancing for the Psychologist Union’s magazine, P, for whom she had conducted an interview with an American professor of psychology. Her article was examined by the magazine, which announced they found examples of plagiarism from American sources in the interview. They named the statement “Serious mistakes in article” and withdrew the article (Dansk Psykolog Forening, 2015). They later changed their internal guidelines of referencing and citing. Rasmussen did not explain why she thought it was okay to reuse interview quotes from another article in an interview done by her, but she did apologize to the editor (Højsgaard, 2015). In a long interview about the whole affair, Rasmussen called it an “absolute nightmare” and insisted that she had not plagiarized but had just been “sloppy”. She admitted to not telling the truth about the use of The Economist’s column in the beginning, declaring that she had “panicked” (Bruun-Hansen & Albrecht, 2015).

This was not the end of the plagiarism scandal. The radio station 24/7, known for their provocative journalism, decided to investigate the editor from Weekendavisen, Soren Villemoes, who had accused Rasmussen of plagiarism, finding one example of plagiarism in his work. Villemoes was not laid off, but the editor-in-chief, Anne Knudsen, promised that “it will never happen again” and that “the rules will be reinforced to the rest of the staff” (Radio 24Syv, 2015). Villemoes was asked to comment on the accusation and admitted that 90 percent of the article is from an article from the site ThinkProgress. “It is deeply embarrassing and I am ashamed of myself,” he said on the radio show The Reporters (Radio 24Syv, 2015).

About a month later, a lengthy report done by an investigative reporter was released by Information examining the work Rasmussen did for the paper. This was the most thorough investigation of the work of the investigations into Rasmussen and consisted of 23 pages, with most space taken up by an in-depth analysis of 11 articles containing “ethical problems” (Jensen, 2016). On the basis of that report, an article was published in Information claiming there were missing references in 11
articles, with editor Christian Jensen emphasizing that these were “not grey-zone cases”:

It is quite extraordinary for a newspaper to bring correction and apologize for 11 articles at once. But both the amount and the character of the errors are really serious. It is completely clear breaking with rules of referencing and the rules for common journalistic ethics.

(Bruun-Hansen, 2016, para. 2)

After an examination of around 30 texts and blogposts Rasmussen had produced as a freelancer for the Journalistic Union Magazine, Journalisten, the editor announced that she has “overall delivered quality” and invited her to return to writing for the magazine (Hesselager, 2016). Rasmussen furthermore launched her own online news site, POV International.

The ecology of citations and paradigm disguise

As we have seen, the news media involved went to great lengths to investigate the accusations and publicly document the transgressions of the reporter. These attempts to regain credibility by distancing are illustrative of a critical incident in journalism.

The Rasmussen scandal followed the same basic form that Thompson (2005) describes in his work on scandals, where we see transgressions of certain norms or values that were once concealed are made visible. The transgressions become known to others, who disapprove of the transgressions and publicly express this disapproval. The result may very well be damage to the reputation of the journalists and news media involved. In the case of Rasmussen, the affected news media tried to distance themselves from the journalist by describing her as a “bad apple” and an “extraordinary case” (Blach-Ørsten et al., 2018). Nevertheless, it was also a moment of inward criticism beyond the Rasmussen case and a time of discussing practices, thereby initiating soft boundary work (S. C. Lewis, 2015) in an attempt to reinstate what is citing and what is stealing. Soft boundary work is understood as talk that articulates boundaries of journalism, and is hence seen in words and symbols; it is juxtaposed with hard boundary making, which involves the more material aspects and psychical resources that are used to uphold and legitimate the claims of the professional fields (S. C. Lewis, 2015). Soft boundary work refers to “talk that articulates boundaries,” while hard boundary work refers to “action that actualizes boundaries” (Schudson & Anderson, 2009, p. 96). The Rasmussen scandal illustrates both these two forms, as the scandal was discussed intensively in public and in the journalistic field, but it also led to some media organizations changing their internal rules of ethics related to specific citing practices, and the journalist in question was laid off from three different media organizations (Altinget.dk, Journalisten, and Information).
Repairing trust in journalism

The response from several of the editors of the involved media outlets was to refer to Rasmussen as “breaking the ethical rules,” not complying with journalistic values, and breaking the trust between journalist and editor. The dilemma in the Rasmussen case was that editors, on one hand, pointed out that what Rasmussen did was “unforgivable,” while, on the other hand, they admitted that copying other journalists is an essential part of journalistic practice:

All journalists orient themselves in other media outlets to follow what goes on and to be inspired. A lot of journalism is in that perspective developments of other journalist’s work. But all journalists also know that you have to reference the sources, if you reuse elements from other media. The rules are described in the “guide for good citation practices” published by the Ministry of Culture. In the area between “inspiration” on one side and “plagiarism” on the other side there is naturally a grey zone, where you can discuss whether inspiration was too much, and that it would have been in order to reference.

(Nielsen & Jerking, 2016, para. 8)

During the news cycle, such stories become what is known as common stories as they travel through the news ecology (Hartley, 2011; Schultz, 2006). This means that when they are cited enough times, they become “owned” by everyone in the field, and citation of the originating news media outlet or journalist is no longer necessary. Interestingly, this is exactly how Rasmussen defended herself in Information, when she was accused of plagiarizing a portrait of Rebecca Brooks from The Guardian:

The episode is known by everyone. It’s a classic, a story which goes around in British politics. No one would assign that story to anyone. This is the only episode which is the same as in the Guardian story, the names and places in that story. It’s not plagiarism, it’s a common story.

(Vaaben & Funch, 2015, col. 4)

As White (1989) notes, “most reporters agree that information that is common knowledge need not to be attributed to a source. But common knowledge is not always easily defined” (p. 271). Hence, in the Rasmussen case it also becomes a question of defining what is “common knowledge” in the grey-zones of plagiarism (White, 1989, p. 271). However, the editors in the Rasmussen case went to great effort to state that there are no such grey zones. Editor in-chief Christian Jensen stated the following in Weekendavisen:
We have clear rules on how to use and quote other material. We have never agreed to an article where everything is based on material from other news media and no quotes or references are used.

(Henningsen, 2015, col. 2)

In the soft boundary-making during the scandal, it is implied that these rules and methods are what separate “bad” journalists from “good” ones. However, it is never clearly stated in any of the articles exactly what these rules and methods are—i.e., the extent to which it is permissible to use other journalists’ work—and why none of the editors prevented the correspondent from breaking them by referring to these rules when she was hired or started freelancing for them. In the aftermath of the Jayson Blair scandal, several editors at The New York Times resigned following the discovery of Blair’s plagiarism and fabrication. These more severe actions on the part of the editors seem related to the type of plagiarism, with fabrication seen as more “serious” than what Rasmussen did. Although not resigning, one immediate concern among the editors involved was how scandals might lead to an increased political focus on media regulation.

I think press ethics is under pressure. We find that the politicians want to increase the penalties given by the Press Council, and I think it is really, really important that we as a media organization keep the credibility flag high and that ethical standards high internally, so hopefully we can self-regulate instead of having politicians start making laws and tightening.

(Vangkilde, 2015, para. 32)

In the case of Rasmussen, Information’s Christian Jensen called the examples of violations “extremely extraordinary” (Schmidt, 2016). The editor of Altinget.dk, where Rasmussen also contributed, described the issue as “serious” and “forbidden.” In the later evaluation done by Altinget.dk of some of Rasmussen’s articles, their editorial chief, Anders Jerking, and Editor-in-Chief Rasmus Nielsen wrote:

As a correspondent you orientate yourself in many types of news media, but every journalist also knows that you have to reference your sources if you cite stuff from other media outlets. Plagiarism is forbidden.

(Jerking & Nielsen, 2015, para. 10)

This resonates with what White (1989) shows in her discussion of plagiarism accusations in a previous case regarding a foreign correspondent. The correspondent—Jonathan Broder—resigned from the Chicago Tribune after he was charged with plagiarizing from the Jerusalem Post. Many colleagues defended Broder and said it was a common practice for correspondents to rewrite the local media—and therefore not plagiarism (White, 1989).
By only investigating the articles of Rasmussen, the problem was framed as caused by the journalist in question, not the system. Information’s report on Rasmussen’s work is extremely thorough, consisting of 23 pages done by an investigative reporter, with most space taken up by an in-depth analysis of 11 articles with “ethical problems.” All of the reports were made public online, and the editors also participated in interviews with other news media, justifying their decision. In their paradigm repair, the editors refer to “rules” and “methods” to which Rasmussen did not adhere. In this way, journalism in general was protected against the scandals since the transgressions were framed as not really journalism, either because it was a case of fraud or because the texts in question did not adhere to the “common rules of journalism.” By referring to these rules as something everyone should know, they thereby distanced themselves from what Rasmussen did, creating clear boundaries between her and everyone else. Some articles underlined that Rasmussen had not gone to a traditional journalism school, thereby questioning whether she was even a “real” journalist and negotiating the boundaries of who is and is not a journalist. Furthermore, the editors publicly announced that they would look at procedures and editorial processes. However, in general, the editors stated that there was nothing wrong with their guidelines and working methods. The solution would not be, as in the Jayson Blair case, for editors to resign. Two months later, when the report of the investigation into Rasmussen’s articles was released, the response was once again that the rules are not the problem; rather, the problem was a lack of knowledge about the rules among journalists:

We want to make sure that our rules and procedures are clear to editors and journalists, employed and freelancers. In the future, we will have a stricter focus on this point when we edit the newspaper.

(Jensen, 2016, para. 9)

Business as usual in the grey zone?

A scandal such as the Rasmussen case brings visibility to the grey zones of attribution in news production. It can be seen as a critical incident because it illustrates a particularly heated moment in the ongoing backstage negotiations of the norms for citing, which leads to making previously unspoken rules more specific. It was a moment in Danish journalism history that led to changes and vigorous debate regarding journalistic norms of citation and attribution. We have seen how the editors of the various media outlets where Rasmussen worked as a freelancer negotiated with the public and the rest of the journalistic field where the boundaries of journalism are when it comes to citing and attributing. The incident was initially centered on one journalist but later spread to a number of journalists being accused, none of whom faced the consequence of being laid off.

We have analyzed this case within the framework of boundary work and have shown how by referring to Rasmussen as a bad apple and a single case of misjudgement, editors and media organizations attempted to expel the deviant journalist.
Hence, the case illustrates this attempt to re-instate boundaries related to, on one hand, highly questionable, unethical, or outright illegal practices, in this case the copying of competitors without citing; and, on the other hand, citing as an integrated and common part of everyday newsroom practices. They did so by calling the actions of Rasmussen “unforgivable” and “forbidden” and by naming it a “scandal,” completely ignoring the commonplace nature of this practice. Interestingly, while this might seem to lead to changes, as a few media outlets formulated rules and official guidelines of “how and when to cite” other news organizations, the general practice and possible problems and grey zones related to this practice remained backstage. In this case the boundary work is also a paradigm disguise of the pretense of journalism as original (N. P. Lewis, 2008). Singling Rasmussen out as a bad apple and stating that “the rules are very clear” thus had the purpose of restoring trust, and the ideal and pretense of journalistic originality was protected.

Furthermore, by excluding Rasmussen to reinstate the boundaries, the field also avoided a debate on the more structural questions of how correspondents work, the pressure of time, the precarious conditions of freelancers, and the editor’s responsibilities. In this way the Danish scandal, and the paradigm repair work done by the editors of the scandalized news media, ended in the same way, namely with the affected news organizations mostly avoiding addressing any systemic issues of journalism dealing with plagiarism (N. P. Lewis, 2008).

References

Peeling or plagiarizing? A Danish media scandal


Children are particularly vulnerable in times of war and armed conflict. The constant threat of violence, upheaval of social life, and breakdown of community structures impact children in ways that are distinct from adults. Traumas like these have been central to the lives of children affected by the Syrian Civil War and refugee crisis, which have ravaged the nation since 2011. With such a disproportionate impact on this group, western news coverage of the war has routinely featured stories of Syrian children, who are either residing in combat zones or fleeing the country as refugees. The press’s focus on children during times of war is not new (Ponte, 2007). However, in recent years, digital technologies have generated a hypervisibility of conditions in Syria through a proliferation of images, videos, and social media accounts of the war. This heightened visibility has often fixated on Syrian children, requiring journalists to now manage large quantities of texts—from both official and non-official sources—that are said to depict brutalized children.

In 2016, the image of Omran Daqneesh captured global media attention during the peak of fighting in Aleppo. At the time, clashes between Syrian government troops and rebel forces had escalated, resulting in destruction throughout the city and widespread violence against citizens (BBC News, 2016). Near the height of this crisis, a military airstrike demolished Daqneesh’s family home on August 17, 2016. Captured by photographer Mahmoud Raslan, the image of Daqneesh shortly after the attack first reached the public when Telegraph reporter Raf Sanchez tweeted the photo (Sanchez, 2016c). The Aleppo Media Center, an anti-Assad activist group, then published video footage of Daqneesh on YouTube. In the video, Daqneesh sits in an ambulance and stares vacantly ahead, moving only to examine the wound on his forehead. Both the photo and video of Daqneesh went viral on social media, and later appeared on nearly every major news source throughout the world.
Within a few days of the airstrike, Daqneesh reappeared in the news after journalists discovered his ten-year-old brother, Ali, had died from injuries sustained in the bombing. A month later, Daqneesh’s story was revived when the press covered an American child, Alex Myteberi, who wrote a letter to US President Barack Obama asking whether Daqneesh could come live with his family. At a September United Nations summit, Obama used Myteberi’s words about Daqneesh to rally international involvement in the refugee crisis. Obama later met with Myteberi to thank him for his letter. Daqneesh, however, remained out of the public eye until the summer, when an interview between Daqneesh’s father and a Russian outlet, *Ruptly*, seized media attention once again. While this video assured the world of Daqneesh’s safety, it also raised questions about whether state forces were pressuring the family to spread propaganda in support of Bashar al-Assad. Despite such concerns, the image of Daqneesh became an enduring symbol of the devastation in Syria, posing exigent questions about the international community’s role in the conflict.

Almost a month after Daqneesh’s story had circulated through the news cycle, Bana al-Abed and her mother, Fatemah, created the Twitter account @AlabedBana to document life in rebel-held eastern Aleppo. The account, once exceeding 328,000 followers, received international media attention shortly after its creation. The posts ranged from al-Abed and her brothers reading or protesting the war to graphic photos of children killed in the area. In December, the Twitter account disappeared after Fatemah al-Abed posted: “We are sure the army is capturing us now. We will see each other another day dear world. Bye.” (F. al-Abed, 2016). The hashtag #whereisBana trended on Twitter amidst rising concerns that pro-government forces had captured the family. The account, however, re-emerged the next day. A couple of weeks later, al-Abed and her family were evacuated to Turkey. There, al-Abed met with President Recep Tayyip Erdoğan, who eventually granted the family Turkish citizenship. In April 2017, al-Abed got a book deal with Simon & Schuster to publish her experiences of the war, which was released that October under the title *Dear World: A Syrian’s Girl’s Story of War and Plea for Peace* (Kanso, 2017).

While al-Abed’s news coverage was characterized by its sympathy for a girl caught in a brutal war, it was also marked by doubt. Skeptics questioned how much autonomy al-Abed actually had in sharing her thoughts online or whether she was in Aleppo at all. This prompted a full investigation by the citizen journalism site *Bellingcat*, which concluded that the family was in Syria at the time and that the Twitter account was primarily run by Fatemah, who, at the very least, edited al-Abed’s posts (Waters, 2016). Even though it remains unclear as to what role al-Abed had in writing the tweets, many news outlets framed reports on al-Abed as if she were the sole actor on the account, situating the child as both a symbol of and participant in the Syrian conflict.

Together, the overlapping reportage on Daqneesh and al-Abed serves as a consequential position from which to articulate how journalists cover at-risk children in the contemporary media environment. Focusing on the US press to highlight how those actors outside of the immediate conflict zone—yet still politically
invested in the war—report on distant crises, this chapter compares how 77 articles from six major US news outlets covered Daqneesh and al-Abed. Using critical incidents as a lens to analyze these cases provides a framework to evaluate the cultural and technological factors informing journalistic practice at a given moment. This study thus begins by interrogating the prevailing myths around childhood that have informed journalists’ treatment of children in the news. It then explores the role of social media, like Twitter, in the press’s approach to covering Daqneesh and al-Abed, revealing the various ways Twitter can be used to create and circulate children’s news narratives.

**Making news matter: The myth of childhood and US journalism**

The press’s treatment of Daqneesh and al-Abed both challenged and reinforced how children have been represented in US news discourse. These representations have been largely shaped by culturally embedded understandings of childhood as a “privileged domain of spontaneity, play, freedom, and emotion” that is inherently separate from the socio-political world (Stephens, 1995, p. 6). The pre-political child is meant to function as a symbol of a better future and redemption for a mistaken past. This symbolization has also been connected to narratives about collective futures, especially that of the nation (Wells, 2007, p. 60). For adults ascribing to this cultural framework, children are to be cared for in spaces where they are “segregated from the harsh realities of the adult world and protected from social danger” (Boyden, 1990, p. 186). While adults are responsible for nurturing the child and, by extension, all children, they are also expected to defend childhood as a sacred stage of life (Wells, 2007).

Although this idealized version of childhood is culturally constructed and historically specific, widespread belief in the concept, and its universality, often result in the abstraction of children from their specific cultural, historical, and political locations (Burman, 1994). The myth of childhood effectively “empties” the child of political agency to serve broader symbolic roles (Kincaid, 1992). Such disenfranchisement is especially problematic in times of war or conflict because it frames children as passive victims that war happens to instead of active players who participate in familial, communal, or national struggles (Burman, 1994). In times of upheaval, “children do not just react to violence as ‘natural’ entities, but as social creatures – as individuals with a personal history and as members of groups with a social history” (Dawes, 1994, p. 191). Moreover, such at-risk children are regarded as “deviant” or “damaged” within the myth of childhood, not only further legitimizing childhood’s romanticization but also perpetuating a hierarchy that determines who is most deserving of protection (Burman, 1994; Moeller, 2002). The complicated realities of children’s lives are frequently enshrouded by a cultural myth that reduces the child to a popular symbol or othered object, but never fully subject.

Despite the myth’s distortion of childhood, the US press has historically presented children through this lens, situating the child as a vital rhetorical resource in
news-making. Children act as “entry points” for news media to bring attention to nearly any event or issue, serving as “proxies” for all sides of a given issue (Moeller, 2002). This phenomenon is especially present in international news stories, where children—primarily the images of them—are often used to represent the devastation of natural disasters, war, and other tragedies. Since children are ubiquitous in all societies, they function as accessible news pegs that render distant disasters more comprehensible (Moeller, 2002). However, it is ultimately the cultural value ascribed to childhood innocence and symbolization of the child figure that serve as the lucrative foundations for shared understanding. This is because these cultural conceptions continue to call forth familiar notions of nostalgia and loss of innocence as well as feelings of pity and responsibility (Wells, 2007) that can be harnessed for rhetorical ends. While this approach reinforces misperceptions of childhood, it is also indispensable for US journalists, who use the child to make events or issues meaningful for their audiences.

The children of Aleppo: Covering Omran Daqneesh and Bana al-Abed

To investigate shifts in journalistic practice during the coverage of Syria, this study is grounded in the concept of critical incidents. Critical incidents function as discursive opportunities for journalists to interrogate their values by examining how elements, like news technologies and archetypal figures, or the users of technology, shape these events in consequential ways (Zelizer, 1992). While scholarship around critical incidents generally surveys journalists’ thoughts on these events after the fact, this study examines immediate news narratives to reveal how journalists responded directly to possible challenges to existing norms and practices. Studying the articles covering Daqneesh and al-Abed offers insights into the actual products of journalistic values and practice, which are ultimately the texts that shape public discourse and opinion.

This study examined 77 articles from The New York Times, the Washington Post, and USA Today, as well as CBS News, Fox News, and CNN. These outlets were not only chosen for their level of reach and circulation (Mitchell & Rosenstiel, 2011) but also to gain a greater sense of the ubiquity of trends across different media. This source selection also considered the ideological leanings of each outlet to include a more representative sample (Mitchell et al., 2014). The final sample was determined by which sources covered both children over a set period.

News and opinion articles were collected from the news sites and LexisNexis by searching “Omran Daqneesh” or “Bana al-Abed.” Based on peak moments of coverage, sampled articles were those published between August 17, 2016, and June 7, 2017, for Daqneesh and September 24, 2016, and May 12, 2017, for al-Abed. The resulting 37 articles on Daqneesh and 40 articles on al-Abed were then subjected to close textual analysis, in which important themes and language were identified and grouped based on what they connoted about how US journalists, informed by certain cultural and professional traditions, report on children.
Finally, this analysis traced the development of these stories specifically through their relationship to social media. This was done by pinpointing and logging moments where journalists used Twitter—the most salient platform in both Daqneesh and al-Abed’s coverage—to collect or circulate information. Using critical incidents as its framework, then, this study interrogates the roles of news technologies and archetypal figures in this case, revealing a possible shift in journalists’ approaches to covering at-risk children outside the US.

Tropes of the child figure in news discourse

US conceptions of childhood were central to the characterization of Daqneesh and al-Abed, illustrating the tacit, yet powerful, influence this cultural myth continues to have in journalism. In Daqneesh’s case, this appeared primarily in the language used to describe him and the collective responsibility “we” as adults shared in his brutalization. In the initial reporting of Daqneesh, articles focused on his body, highlighting his “chubby arms and legs” or how “his little feet barely extend beyond the seat” (Barnard, 2016; Narayan, 2016). Some news outlets emphasized Daqneesh’s T-shirt with a cartoon character from *CatDog*, a US children’s TV program. These descriptions aimed to “reveal” the innocent child underneath the trauma, despite another report lamenting that “there is no childhood” in Syria (Williams, 2016). Taken together, such sentiments can reinforce colonial assumptions about the superiority of life in “the West.”

In fact, when Daqneesh later appeared on *Ruptly*, his innocence was said to be restored. According to the press, he looked “like any other healthy young boy” (Schmidt, 2017) and “much like any other 4-year old – he [liked] to watch *Tom and Jerry* cartoons and play with toy cars and building blocks” (Pleitgen, 2017). Not only was this “return” to innocence unlikely, but such a narrative aimed to assimilate Daqneesh into a westernized conception of childhood—one that was more appealing for the journalists and their audiences. Whether done consciously or not, this frame thus aided in the maintenance and perpetuation of the US-centric cultural myth.

Many news outlets also discussed the responsibility of adults to protect Daqneesh. In the early coverage, reports emphasized the images of Daqneesh “sitting silently in an ambulance awaiting help” (Khadder & Ellis, 2016). Partly because he was alone in the images, this language often exuded a paternalistic tone, in which Daqneesh was said to need rescue since his family, apparently, had failed to do so. Unsure of the status of Daqneesh’s family, a *Washington Post* article wondered if Daqneesh would “have someone to claim him and care for him after he has healed from his wounds.” That same article deplored “our” failure in stopping the suffering, stating: “We, as a global community, have turned our back on Omran” (Attiah, 2016). This rhetoric harkens back to the adult’s expected role as the protector of any child in need but, at the same time, evokes a broader paternalism that infantilizes Syria as a whole. In addition to the proclamations of Daqneesh’s symbolic value—in which he was repeatedly hailed a symbol of Aleppo’s suffering—
the prevalence of these tropes in Daqneesh’s coverage aligned with traditional representations of children in the news.

Although descriptions of al-Abed emphasized notions of childhood in ways similar to Daqneesh, al-Abed’s online presence actively shaped what tropes the press used, distinguishing her from most children in the news. Descriptions of al-Abed often centered on her “gap-toothed” smile (Karadsheh, 2016), “missing front tooth,” (Ingber, 2016) and brown hair, which was “neatly tied back and topped with a delicate pink bow” (Specia, 2016). These markers were meant to accentuate al-Abed’s feminized innocence, despite posts showing her scared, sick, or injured during the war. This focus on al-Abed’s innocence continued with coverage of her self-professed interests. Al-Abed described missing school and her friends, wishing to write a book, and enjoying *Harry Potter*. However, these articulations of innocence broke down when juxtaposed with the posts about war: “This is our bombed garden. I use to play on it, now nowhere to play” (B. al-Abed, 2016a). Later posts detailed how her “beloved dolls” had “died” in a bombing (B. al-Abed, 2016c). Although these tweets revealed the unstable boundaries between the “innocent” childhood and the “real” world, journalists were still able to maintain the myth by emphasizing familiar tropes, like al-Abed’s pink bow. At the same time, al-Abed’s tweets directly informed how she was depicted in the news, constraining, to some extent, the liberties journalists took in their reportage.

Ultimately, both Daqneesh and al-Abed were treated as symbolic figures by journalists, who juxtaposed childhood innocence with war to signal deeper meanings about humanity and “our” collective failure in protecting these children. In this way, the news coverage of Daqneesh and al-Abed reflected traditional reportage, in which the tropes of a romantic childhood constructed the child as a symbolic figure “beyond” their political circumstance. However, this ideal quickly becomes complicated in the age of social media where subjects in the news can “speak back” to the press and to the public.

**Voice or voiceless: Children’s agency in the news**

Despite his visibility in US news discourse, Daqneesh’s voice was almost entirely excluded from his news narrative. In fact, throughout his coverage, many other sources were featured, including Mohammad Daqneesh, UNICEF’s director, the photographer, rescue workers, doctors, and President Obama. While each of the sources made some comment or speculation about Daqneesh’s experience during the airstrike, Daqneesh’s testimony was largely absent. He was even described as uniquely quiet. One article emphasized that “he [didn’t] react, he just [didn’t] respond” (Elbagir, 2016) while in the ambulance, and photographer Mahmoud Raslan was quoted, stating: “Omran was silent, which distinguished him from the rest of the children that day” (McKay, 2017).

While Daqneesh’s silence aligned with traditional representations of children in the news, this did not prevent other children from having a voice. Alex Myteberi, a child from New York, functioned as Daqneesh’s foil in US public discourse,
embracing the child divorced from war and, thus, still securely situated within western models of childhood. Myteberi’s letter to Obama became the focus for many articles, in which Myteberi wrote: “We will give him a family and he will be our brother” (SkyNews, 2016). Reports even chronicled Myteberi’s meeting with Obama, in which the president voiced: “I liked your letter so much that I ended up reading it to everybody, and so everybody heard what you said” (Wang, 2016). In this way, Myteberi’s personal perspective defined his news narrative. Meanwhile, out of the 37 articles in the analysis, just three included the interview where Daqneesh was actually quoted. While two of the articles only featured Daqneesh stating his name and age, CNN quoted Daqneesh describing the night of the airstrike as “the house fell on top of us” (Pleitgen, 2017). This shows that Daqneesh was capable of contributing his perspective but was still excluded. Given the US public’s largely unfavorable view of the Middle East (Gallup, 2018), it is unsurprising that Myteberi’s voice—far removed from life in war-torn Syria—was elevated over Daqneesh’s first-hand experience (McCarthy, 2016).

What distinguished al-Abed from Daqneesh was that her voice was generally granted a legitimate platform and served as the driving force for almost every article in the analysis. Of the 40 articles that covered al-Abed’s story, only three stories did not include tweets, interviews, or videos featuring al-Abed. The legitimization of al-Abed’s perspective even allowed her to adopt different roles in the public sphere. In the initial coverage of the story, al-Abed and her mother served as documentarians, offering glimpses into the daily life of a family under military threat. One post showed a photo of al-Abed after an airstrike with the text: “Tonight we have no house, it’s bombed & I got in rubble. I saw deaths and I almost died” (B. al-Abed, 2016b). Other photos and videos chronicled the destruction of homes and businesses as well as casualties in the area, with al-Abed as the documentarian providing a rare insight into a child’s perspective during war.

After al-Abed’s family fled to Turkey, she undertook the role of the “distant” advocate, using Twitter to implore global leaders to end the war in Syria. al-Abed wrote a letter to US President Donald Trump, asserting: “You must do something for the children of Syria because they are like your children and deserve peace like you” (Hanrahan & Omar, 2017). She also demanded that French President Emmanuel Macron “do something for the children of the world” (B. al-Abed, 2017). al-Abed and her mother continued to protest the war from Turkey, regularly posting images of the horrors ongoing in Syria. With the publishing of her book, Dear World, the final role al-Abed assumed was that of an author. While commending al-Abed for turning her experiences into a published memoir, reports still emphasized the symbolic power of al-Abed, the “voice of Aleppo” (Park, 2017). Many news articles, for instance, foregrounded a quote from a Simon & Schuster editor who said that Bana’s tweets “transcend[ed] the headlines and pierce through the political noise and debates to remind us of the human cost of war and displacement” (Gibson, 2017). Although the book dealt bolstered al-Abed’s legitimacy as a voice in the public sphere, the core function of children as symbolic
figures in the news still materialized, demonstrating its lasting rhetorical appeal for journalists covering these stories.

al-Abed’s news narrative was also marked by controversy, in which various groups questioned the authenticity of her role on the Twitter account. These groups condemned Fatemah al-Abed for supposedly simulating her daughter’s voice to get media attention. While many US news outlets reported on these accusations, including The New York Times and The Washington Post, which devoted full articles to the controversy, others, like CNN and Fox News, did not discuss the claims. Reports detailing the criticism of al-Abed also differed. The New York Times remained ambivalent toward al-Abed’s agency over the account, while The Washington Post characterized Bellingcat’s investigation into these claims as “effectively fact-checking the life of a Syrian child” (Taylor, 2016). However, despite this controversy, news outlets continued to refer to al-Abed as the sole actor on the account, suggesting a desire to maintain al-Abed as this “voice of Aleppo” against al-Assad’s regime or a return to journalistic norms that prioritize unambiguous stories of individual agency (see Galtung & Ruge, 1973). On one hand, the treatment of al-Abed within her news narrative was exceptional, suggesting a possible shift in the prioritization of children’s voices in US political discourse. On the other hand, it highlighted the complications that arise when social media are relied on for information during crises. While al-Abed’s coverage represented the foregrounding of children’s perspectives, especially in comparison to Daqneesh, it also generated new questions for journalists about how to evaluate sources and digital technologies in times of conflict.

Production and circulation of children as news

The internet has altered the ways news is generated and consumed. In the case of Syria, many stories have been pulled from social media accounts, situating the internet as a central resource for wartime news (Varghese, 2013). Daqneesh’s news narrative was no exception. The image of Daqneesh after the airstrike was first published on Twitter by Raf Sanchez at 8:56 PM EET (Sanchez, 2016a). Around 15 minutes later, the Aleppo Media Center published a YouTube video of Daqneesh sitting in the ambulance (Aleppo Media Center, 2016). Sanchez then tweeted another photo of Daqneesh, this time identifying him, with a follow-up post describing more details about the attack (Sanchez, 2016b). Once these images were posted online, news outlets from around the world began to pick up the story. In the following days, the images of Daqneesh first published to social media became central to the coverage.

However, besides the role of social media in breaking the story, subsequent coverage of Daqneesh unfolded in a familiar pattern. Daqneesh’s story was picked up by a professional journalist, framed by the news elite, and then circulated through online and television news outlets. Even as Daqneesh’s news narrative developed with the death of his brother, the letter from Myteberi, and the Ruptly interview, the story’s framing and circulation were largely dictated by the
institutional press. The press’s control of Daqneesh’s narrative reflected more traditional notions of how stories about children advance through the public sphere. The difference here is the presence of social media, which allowed for multiple, separate sources to publish different materials around the same time. These materials then became the defining visuals of the story. Although the reliance on Twitter in the coverage reflected US journalists’ increased use of the platform for news-making (see Bane, 2019), the narrative built around Daqneesh ultimately aligned with conventional journalistic norms and practices for how to report on children caught in wars.

In contrast to Daqneesh’s case, the production, framing, and circulation of al-Abed’s news narrative was a dynamic process that involved both the child and the news elite. Here, al-Abed and her mother created a Twitter account in September 2016 to document their experiences of war. By the end of that month, news outlets had begun to report on al-Abed’s account. Even though both Daqneesh and al-Abed’s news narratives originated on social media, Daqneesh’s story began as a singular event, while al-Abed captured media attention as a public figure. The children’s narratives continued to diverge with Daqneesh’s story being largely event-driven and al-Abed’s story being driven by both events and her tweets. For instance, numerous news articles were published around events in al-Abed’s life, like her family’s escape to Turkey, but many other stories were written in response to her tweets. One example of this was a New York Times article that offered a detailed profile on al-Abed through her Twitter posts (Specia, 2016). Perhaps more notable was the news coverage during the period where al-Abed’s account went silent. News outlets reported on the sudden absence of posts until the account became active again with the tweet: “Hello my friends, how are you? I am fine. I am getting better without medicine with too much bombing. I miss you” (B. al-Abed, 2016d). This suggests a dynamic, symbiotic relationship between journalists and al-Abed in the creation of her news narrative, in which meaning was negotiated—and renegotiated—depending on the conditions underlying the media landscape at a particular moment.

**Syria as a critical incident**

By comparing the coverage of these children through a critical-incidents framework, this study pinpointed probable shifts in journalistic norms and practices when reporting on children. What remained unchanged in both cases was the continued use of tropes pertaining to the myth of childhood and the symbolization of the child. While this rendered Daqneesh voiceless throughout his coverage, al-Abed’s voice became central to her news narrative and a point of departure from the press’s traditional treatment of children. By tracing the circulation of Daqneesh and al-Abed’s narratives online, this analysis also compared the role of news elites and Twitter in both cases. While the dissemination of Daqneesh’s story reflected existing journalistic norms, in which the institutional press determined the narrative, al-Abed’s online presence pushed news elite to account for her perspective while
covering her story. Together, these key differences situate the Syrian Civil War as a critical incident in journalism, in which the treatment of children during wartime reportage is complicated, challenged, and possibly transformed.

Central to this analysis is the increasing role of social media in the production and circulation of news. Technologies, or the “devices that shape an incident into news,” are an important part of what makes a critical incident (Zelizer, 1992, p. 67). Periods of rapid technological change drive journalists to renegotiate institutional norms and practices to report on such events. In this study, it is social media’s growing prominence as a news technology that categorizes the cases of Daqneesh and al-Abed as a meaningful critical incident for reporting on children during wartime.

Social media’s influence on news is an ongoing phenomenon, changing how the press approaches institutionalized practices like sourcing, verification, and gatekeeping. In terms of sourcing norms, journalists, even in the digital age, generally prefer to use official sources from institutions over “less credible” sources, like ordinary civilians (Paulussen & Harder, 2014). While the opaque nature of conflict and pace of news often complicates this standard in today’s wartime reporting, the repeated use of al-Abed and her Twitter account as a source, despite skepticism about its authenticity, suggest that sourcing norms may be altered when various factors, including the context and appeal of the source, converge. Similarly, the process of verification, or authentication, has been complicated by the “velocity, volume and visibility of social media content” (Hermida, 2016, p. 88). This is most evident in al-Abed’s case, in which reports often took her posts at face value both before and after doubts were raised about their authenticity. Even in instances where events and people were authenticated, like in Daqneesh’s case, skeptics still questioned their validity. In response to Daqneesh’s image, for instance, Bashar al-Assad publicly asserted that it was a “forged picture, not a real one” (Specia & Samaan, 2017). This exhibits some of the challenges social media poses for journalists and their coverage of vulnerable populations, such as at-risk children.

Finally, gatekeeping, or the “power to decide which messages may and may not pass through [certain] channels,” remained generally stable in Daqneesh’s coverage, with news elite controlling the progression of the official news narrative (Welbers & Opgenhaffen, 2018, p. 4730). In contrast, al-Abed’s social media presence disrupted traditional conceptions of gatekeeping, pushing journalists to reimagine who can legitimately contribute to news discourse and when. Not only does this align with recent scholarship on gatekeeping’s transformation in the digital era (Tandoc & Vos, 2016; Vos & Heinderyckx, 2015), but it also extends this discussion by highlighting how some of the most marginalized and undervalued voices, like children, can shape mainstream news coverage through social media.

Beyond news technologies, critical incidents also highlight the importance of archetypal figures, who “successfully use the technology of news reporting” (Zelizer, 1992, p. 68). Although this concept traditionally concerns notable journalists, the rise of the internet, social media, and trends like citizen journalism have broadened the scope of who can harness these technologies to make news. For
Daqneesh, the archetypal figure was Raf Sanchez. Sanchez brought Daqneesh into public discourse through Twitter, posting the first images and details about the story. In contrast, al-Abed’s case did not feature archetypal figures in the typical sense of the term. Instead of professional journalists, it was principally al-Abed who utilized the technology—social media—to depict life in besieged Aleppo. In fact, al-Abed and her Twitter account became synonymous within public discourse, positioning the young girl as the face of a now vital tool for journalists. Overall, Daqneesh and al-Abed serve as diverging examples of how journalistic norms and practices for reporting on children are being sustained or modified. In this way, social media act as transformative news technologies, altering how we conceptualize the actors at the center of critical incidents, approach covering children, and think about journalism more broadly.

**Conclusion**

Social media platforms continue to reshape the ways in which news is produced and consumed. At the same time, these sites are becoming increasingly central to how journalists report on war and armed conflict. In Syria, journalists have often used social media platforms to gather the latest information on the war. For children caught in this conflict, social media have drawn greater visibility to their stories, while posing new challenges for how journalists should approach covering these children. Here, the notion of critical incidents provided a theoretical framework for considering how coverage of Syria may indicate a change in US journalistic norms and practices. For children caught in distant wars, this analysis foregrounded the traditions that have informed coverage of children as well as the forces, like social media, that may change them.

Beyond journalistic practice, the ongoing exclusion of children’s voices from the news should elicit public concern. Coleman (2011) makes the important observation that “without children’s voices in the news, citizens will not fully understand their worlds. Reports on injustices against children will lack the emotion and credibility that these small voices bring. Society stands to lose as well” (p. 267). News coverage of Syria is the main information source for the US public on a distant war. The way news outlets approach Syria, and the perspectives they draw from, impact public opinion and policy concerning the war and its refugee crisis. With such high stakes, it is pivotal that audiences have access to information that facilitates better judgements about the world. While information during periods of conflict is fundamentally opaque, this does not mean accurate accounts of life in a warzone do not exist. Despite the media’s continued hierarchizing of voices deemed “valuable,” children’s perspectives on their experiences can still offer valuable information about the realities of war and the costs it exacts. In the case of Syria, children’s voices may be critical in rehumanizing a conflict in its ninth year that is in danger of losing the compassion of the global community.
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2.3

REPORING WHEN THE CURRENT MEDIA SYSTEM IS AT STAKE

Explaining news coverage about the initiative on the abolition of public service broadcasting in Switzerland

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On March 4, 2018, citizens in Switzerland rejected the “No Billag” initiative. The initiative demanded the abolition of the mandatory license fee for broadcasting. Proponents officially labeled it “No Billag” because the company tasked with collecting the license fee from households and companies was called “Billag.” In Switzerland’s small and linguistically segmented media market, the license fee guarantees the existence of the national service public broadcaster SRG SSR (henceforth SRG), the largest media organization overall. A part of the license fee is also used to support 34 private radio or TV broadcasters, which produce regional or minority programs. In short, the initiative threatened the very existence of several news organizations and implied far-reaching consequences for the current media system as we know it—a media system already heavily challenged by the influence of global tech companies, which aggravate trends towards less news consumption and sinking advertising revenues for journalism (Reuters Institute for the Study of Journalism, 2019).

Although Swiss citizens ultimately voted against this radical policy proposal with a majority of 72%, the outcome was far from expected. Earlier polls had indicated favorable ratings for the initiative, and Switzerland’s largest party (Swiss People’s Party—SVP) had decided to officially support it. Journalists and news organizations had many reasons to be anxious about the vote. This concerned not only those journalists and media organizations whose funding and jobs ultimately rely on the license fee but also all other journalists and media organizations—though for various reasons. Some were afraid they would lose the public broadcaster as an important benchmark for the quality of news. But those in favor of the initiative expected, with the possible demise of the large public service broadcaster, new business opportunities or supported the idea of a more market-based media system.
While this vote was certainly a unique and special event for journalists and media organizations, as it affected them directly, the vote was at the same time one of many votes in Switzerland’s direct democracy. Journalists are used to covering referendum campaigns up to four times a year, and they have developed clear professional standards. But how could they cover the “No Billag” initiative impartially, when it involved a media policy debate that included high stakes and various (self-)interests of media organizations themselves?

In this chapter, we trace how the news media covered the run-up to the vote on the “No Billag” initiative. By analyzing this critical incident (Zelizer, 1992) with prominent metajournalistic discourse (Carlson, 2016), our goal is to explain whether and how diverging interests of media companies shaped news coverage about the initiative. Empirically, we compare news coverage in different news outlets of different news organizations that have different (self-)interests in this initiative, systematically integrate the “three rationales” of media ownership (Nielsen, 2017), and apply them to the analyzed media companies. We consider not only the profit rationale, which is the focus of most empirical studies, but also the power and the public rationale. Our results contribute to addressing the question of how structures on the meso level of organizations affect journalistic practice on the content level in a moment of turbulent change.

“No Billag” as a critical incident

Media policy debates are special cases for news media as media organizations themselves are involved in or directly affected by policymaking. As Ali and Puppis (2018) argue, media organizations are in a powerful position because they can shape public debate about the regulation of their field. Media companies could, for instance, treat media policy as a nonissue or distort the portrayal of media policy issues. It is an ever-burning question whether and, if so, to what extent media companies shape the content of their products in line with their interests in media policy. From a normative perspective, this is a relevant question because news coverage should follow professional standards that are crucially based on the principle of journalism’s autonomy and independence, regardless of the actual interests of media companies (Bailard, 2016).

This also applies to how media organizations should treat, and how journalists should cover, the “No Billag” initiative in Switzerland. Despite the clear rejection at the polls, we argue that the “No Billag” initiative was a critical incident for journalism. Critical incidents can take many different forms, but they all function as “discursive opportunities for journalists to ensure the well-being of their interpretive community by reconsidering, rearticulating, and reinforcing their boundaries and authority” (Tandoc et al., 2019, p. 676). Critical incidents are, ultimately, discourses about journalism. Compared to metajournalistic discourse in general, which denotes any kind of discourse in which “actors publicly engage in processes of establishing definitions, setting boundaries, and rendering judgments about journalism’s legitimacy” (Carlson, 2016, p. 350), the notion of critical incidents
implies a high intensity of this discourse and an incident with a far-reaching potential for change for journalism. Given this, we posit that the “No Billag” initiative is an illuminating case of a critical incident for at least two reasons: the potential threats and the tensions between media organizations’ interests, and journalists’ practices in covering and discussing a binding public referendum.

This radical initiative constituted a serious threat or opportunity for many media companies, which would culminate on a single day—the day of the vote. Public debate in the run-up to the vote was much more intense than previous votes, and turnout (55%) was higher than the average turnout in the last seven years (46%). Additionally, earlier polls had made many believe in a much closer outcome; one important survey around two months before the vote even found a majority of citizens accepting “No Billag.” The threat was imminent and affected the media system as a whole, since the license fee makes up for most of the revenue of the public broadcaster SRG, Switzerland’s largest media organization (around one quarter of its revenue comes from advertising), and finances the large majority of regional private radio and TV stations to a significant extent. This threat was also immediate, as the initiative asked for the abolition of the license fees within nine months, with hardly any time for organizations to adapt to this potential worst-case scenario. In Switzerland’s small and fragmented news market, these organizations most likely would be unable to operate without this funding on a purely commercial basis and would ultimately cease to exist. Thus, the media system as a whole was at stake.

Tensions also arose in journalistic practice in the treatment of this initiative, which was reflected on discursively. Whether this initiative should be considered “unique” for journalists (as they were directly involved) or “routine business” given the long tradition of reporting on direct-democratic votes was uncertain. While media in countries with only infrequent direct-democratic votes are not used to this type of campaign, journalists in Switzerland have learned to deal with direct-democratic campaigns and produce issue-oriented, substantial, and unbiased news reporting (Kriesi, 2012; Marcinkowski & Donk, 2012).

The public service broadcaster was severely challenged, as proponents of the initiative and other media in several news articles claimed that its news reporting should be absolutely balanced between both sides, despite the fact that the opposing camp (i.e., those against the initiative) was much larger. Journalists of the public broadcaster were also heavily criticized in news media for using their private social media accounts to argue against the initiative. Related to this, tensions arose in journalistic practice as many journalists had to deal with conflicting roles as members of a community who support the SRG as an important contributor to quality journalism, and as members of their media company, which might have other interests.

**Examining factors shaping a critical incident**

Relying on a review of the literature, one could expect that news outlets fail “to report accurately on issues in which their corporate owners have a vested interest”
(Schejter & Obar, 2009, p. 578). One reason media companies have an impact on the journalistic production of news is the erosion of the organizational division between media companies and news outlets (Pointner, 2010). Survey data indicate that Swiss journalists themselves experience pressure from their profit-oriented media companies and rarely report on news that criticizes their own media company (Puppis et al., 2014).

However, many media companies are guided not only by a profit rationale but also by a power or a public rationale (Nielsen, 2017). In the power rationale, media are operated as organs of influence by their owners like political parties or religious organizations. While the profit rationale means that the operation of a news outlet is about making profit, the public rationale is about “politically mandated delivery of a service to the public” (Nielsen, 2017, p. 34). Benson et al. (2018) identify three broad modes of ownership: political instrumentalism, economic instrumentalism, and public service orientation. From this normative perspective, public service media as ideal types are considered to be in the best position to serve the public interest. In practice, of course, news media might follow more than one rationale at the same time or have a mode of ownership falling between the three modes.

In comparison to economic instrumentalism or the profit rationale, the power rationale and the public rationale are rarely examined in empirical studies on media policy issues. Even fewer still are those studies that try to look at the interplay of these three rationales, for instance by comparing profit-oriented media companies with a different political stance (power rationale) in Germany or Switzerland (Dybski et al., 2010; Udris et al., 2016). The most sophisticated analysis in this respect comes from Bailard (2016), who studied media coverage of 33 newspapers from 12 media companies in the United States. Importantly, she also controlled for the “political slant” of a news outlet by comparing coverage about one issue where media companies have economic interests, and one issue where media companies are not affected. She showed that, no matter the usual political stance:

corporations with more television stations, which equates to more airtime to sell to political advertisers, were significantly more likely to mention positive consequences associated with the Citizens United ruling compared to companies with fewer or no television stations, and they were also somewhat less likely to mention negative consequences relative to their counterparts who stood to gain less financially from the ruling.

(Bailard, 2016, p. 594)

In short, her study gives empirical support for economic instrumentalism and the influence of the profit rationale, which is probably not surprising given the “economic field dominance” in the US media system (Benson et al., 2018, p. 275). This situation, however, might be different in other countries, such as in Switzerland.
Methods

With this case study, we show how journalists reacted to the “No Billag” initiative and to what extent political, public, or economic interests of media companies have an impact on campaign news coverage. We examined news coverage on the “No Billag” initiative for four months during the campaign period in the run-up to the vote in 23 news outlets from eight media companies. Where possible, we included several outlets for each media company; some media companies have only one outlet. We examine the amount of media attention, putting it into context with other votes; we also analyze the tonality of news items and explain tonality with a regression analysis of structural features on the level of news outlets and media companies.

We operationalize media companies’ rationales and possible interests at the time of the “No Billag” campaign with a set of indicators, taking into account that some interests might conflict with one another. These interests in form of structural features and characteristics are integrated in Figure 2.3.1. For instance, the private media organization AZ Medien owns regional TV stations, which are supported by the license fee, but at the same time clearly sees SRG as a competitor. Thus, in terms of interests, AZ Medien might be ambivalent towards the “No Billag” initiative. We expect effects on the tonality of media coverage as follows.

First: Does ownership of radio and TV stations mean more rejection of the “No Billag” initiative? Obviously, the core mission of the public broadcaster SRG, the production of radio and TV, would no longer be possible without public funding. To protect its own existence, SRG is expected to criticize “No Billag.” Additionally, those private media companies that own regional radio and TV stations are expected to criticize “No Billag” because they follow a profit rationale and are interested in keeping the existing revenue channel from the license fee.

Second: Do those private media organizations that see themselves as competitors of the SRG in the television sector show support of the initiative? Currently, only AZ Medien substantially invests in the television sector and can thus be called a competitor of the public broadcaster.

Third: Do those media organizations that perceive the public broadcaster as a threat in the online sector show support for the initiative? We consider NZZ Mediengruppe, Tamedia, as well as AZ Medien, as competitors of the SRG, since their news sites offer similar reporting (daily news coverage of relatively high quality) in a relatively wide (geographical) area. In contrast to that, competition is low in the case of Ringier, as it deliberately offers tabloid journalism; Somedia and Basler Zeitung, as they only produce in one region; and Weltwoche, as it is published only once a week.

Fourth: Does an existing partnership with the public broadcaster also mean there is more rejection of the “No Billag” initiative? Ringier is the only media company that has an additional economic interest, which is part of the profit rationale: it holds a public-private partnership with SRG in an “advertising alliance” (from 2015 to 2019). Other media companies are not part of this platform. Thus, we expect news outlets by Ringier to be especially critical of the “No Billag” initiative.
Fifth: Do quality-oriented media cover the “No Billag” initiative more negatively than low-quality outlets? For this research question, we consider that news outlets—if truly independent from their owners’ interest—follow a public rationale and portray issues in the public interest. Since various studies have demonstrated the value of public service broadcasting for society (see, e.g., Nielsen et al., 2016) and since the public broadcaster in Switzerland measurably produces news of very high quality (Fög—Forschungsinstitut Öffentlichkeit und Gesellschaft/Universität Zürich, 2019), we would expect journalists interested in rational, substantial public debates and a healthy media system to know this. This is why we expect quality media to be especially critical of the initiative.

For the measurement of the overall quality of the analyzed outlets, we rely on a quality index developed at the University of Zurich. In its “Yearbook Quality of the Media,” Fög—Forschungsinstitut Öffentlichkeit und Gesellschaft/Universität Zürich (2018) publishes detailed results on media quality for a wide range of Swiss news outlets. For this paper, we use the quality scores for the calendar year 2017, as this covers most of the campaign weeks.¹

Sixth: Does a news outlet’s typical stance, as part of the power rationale, affect its coverage of “No Billag”? “No Billag” is a political conflict that also lies on the economic “left-right” dimension; consequently, “No Billag” is supported only by right-wing political actors. The political stance of an outlet (or lack thereof) is measured with an index developed at the University of Zurich in the scope of the project “Vote Monitor,” which covers 33 initiatives and referenda other than “No Billag” (Jandura & Udris, 2019). For SRF and RTS, data with the same time frame (September 2014 to March 2018) was available for only two votes. Therefore, for SRF and RTS, we also used data on additional nine votes that took place after the “No Billag” vote in 2018 and 2019. Tonality towards votes is standardized so it fits on a left-right scale, with negative values indicating either support for a left-wing proposal (e.g. introduction of basic income) or rejection of a right-wing proposal (e.g. faster expulsion of “criminal foreigners”) and positive values indicating the opposite. The scale ranges from −100 to +100.

For the quantitative content analysis of news coverage about “No Billag,” we included 1,338 print articles, TV newscasts, and website articles. The main author was responsible for the coding. On the article level, coding included the tonality towards the initiative, ranging from positive (= support for “No Billag”), to ambivalent, to negative (= rejection of “No Billag”). This constitutes the main dependent variable, which is also used in the regression model; on the article level, tonality values are used as indicator for the support of “No Billag” (negative = indicating opposition: −100; indicating balanced or ambivalent stance: 0; positive = indicating support: +100). For descriptive analyses on the level of news outlets or media companies, tonality indices are displayed, which range from −100 to +100. They show the overall stance of a media company or news outlet towards “No Billag” and are calculated by subtracting all negative items from positive items, divided by all items (including articles with a balanced or ambivalent tonality) and multiplied by 100.
For each article, we also coded the source of tonality, i.e., media as actors/speakers vs. articles with (political) actors as main sources. To determine the main source, we not only relied on formal characteristics such as article type (e.g., editorial: “media”) but also relied on the presence of journalistic evaluations and interventions in the examined news items. Thus, “media” was also coded in more descriptive article types when journalists themselves clearly inserted “their” voice.

Findings

We first present results on the overall media attention before turning to the tonality towards the “No Billag” initiative. Our results show that news coverage was extraordinary in terms of the massive amount of attention journalists awarded to the “No Billag” initiative. In the measured campaign period (17 weeks), 23 news outlets published 1,338 news items on the “No Billag” initiative. According to the project “Vote Monitor” (34 votes between 2014 and 2018) (Table 2.3.1), media attention to “No Billag” was more than three times above average. This high media attention came from most outlets. For 90% of the examined outlets, “No Billag” was among the three votes that were most intensively covered. For 71% it was even the most covered vote.

Adding to this, attention to “No Billag” was extraordinarily high because media attention started unusually early (Udris, 2018). Four months before the vote, the media intensified their reporting, claiming that the debate was heating up on social media. At this stage, the debate focused on the SRG, and its role and performance were heavily criticized. Several news items covered the increasing social media activities of journalists working for the public broadcaster who spoke out against “No Billag.” This led to strong accusations against the SRG of interventionist reporting and bias. Media attention and support for the initiative grew rapidly, up to the point that the responsible government minister rescheduled the start of her official campaign to an earlier date to counter the increasing support for the initiative. Especially in this early phase, this unusual media attention underlines that journalists as a community perceived the significant threat or opportunity the initiative posed for the media system. Overall, there was no indication that media companies and their outlets tried to downplay media policy issues, which they often do for fear of exposure and criticism (Ali & Puppis, 2018).

In terms of tonality, rejection of “No Billag” was definitely more pronounced than support, with more than three times as many news items with negative than positive tonality towards “No Billag.” Comparatively, this negative tonality (overall

<table>
<thead>
<tr>
<th>TABLE 2.3.1 Media attention to “No Billag” in comparison</th>
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<tbody>
<tr>
<td><strong>Ratio “No Billag” – average of referendum coverage</strong></td>
</tr>
<tr>
<td>News outlets with “No Billag” as top issue</td>
</tr>
<tr>
<td>News outlets with “No Billag” as top 3 issue</td>
</tr>
</tbody>
</table>

n = 10,041 news items. Data based on “Vote Monitor” (see Jandura & Udris, 2019).
is not unusual. Data from the “Vote Monitor” shows that initiatives, which are typically launched by a minority and rejected by the majority, usually trigger much criticism (especially closer to polling day), while proposals launched by the government and parliament usually find more support. In this sense, tonality in the media reflects political power. In the case of “No Billag,” the negative tonality was therefore a result from the fact that the government, most parties, and most associations rejected the proposal. What is special about “No Billag,” then, is not the negative tonality per se but the absolute high volume of criticism toward “No Billag,” as the initiative received much more attention than other national votes.

When interpreting tonality scores in different media companies and different news outlets, we are therefore more interested in differences among these tonality values and not so much in absolute values (e.g., whether they are positive instead of negative). Turning to the organizational level, large differences in the portrayal of the initiative among media companies became clear (Figure 2.3.1). News coverage of Weltwoche AG, the only case with positive tonality, clearly differed from other organizations. But even negative tonality scores differed among companies, from only slightly negative news coverage in BaZ Medien (–16) to very negative coverage in Somedia (–50).

Differences were even greater among individual news outlets. Those media companies owning several news outlets showed quite a wide spectrum of tonality.

<table>
<thead>
<tr>
<th>Media organization</th>
<th>News outlet</th>
<th>Characteristics of media organizations and outlets</th>
<th>Coverage of &quot;No Billag&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Media Quality</td>
<td>Political stance</td>
</tr>
<tr>
<td>SRF</td>
<td>Average</td>
<td>7.4</td>
<td>-5</td>
</tr>
<tr>
<td>RTS (f)</td>
<td>7.5</td>
<td>-6</td>
<td></td>
</tr>
<tr>
<td>SRF (g)</td>
<td>7.3</td>
<td>-5</td>
<td></td>
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<tr>
<td>To media</td>
<td>Average</td>
<td>6.1</td>
<td>-16</td>
</tr>
<tr>
<td>20 minutes (g)</td>
<td>5</td>
<td>-7</td>
<td></td>
</tr>
<tr>
<td>20 minutes (f)</td>
<td>4.5</td>
<td>-5</td>
<td></td>
</tr>
<tr>
<td>24-Heures (f)</td>
<td>7.0</td>
<td>-26</td>
<td></td>
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<tr>
<td>Berner Zeitung (g)</td>
<td>6.2</td>
<td>-13</td>
<td></td>
</tr>
<tr>
<td>Le Matin (f)</td>
<td>4.7</td>
<td>-40</td>
<td></td>
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<tr>
<td>Le Matin Dimanche (f)</td>
<td>6.6</td>
<td>6</td>
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<tr>
<td>SonntagsZeitung (g)</td>
<td>6.9</td>
<td>-6</td>
<td></td>
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<tr>
<td>Tages-Anzeiger (g)</td>
<td>7.2</td>
<td>-32</td>
<td></td>
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<tr>
<td>Tribune de Genève (f)</td>
<td>7</td>
<td>-23</td>
<td></td>
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<tr>
<td>NZZ Medien</td>
<td>Average</td>
<td>5</td>
<td>-20</td>
</tr>
<tr>
<td>Blick (g)</td>
<td>4.2</td>
<td>-28</td>
<td></td>
</tr>
<tr>
<td>Blick am Abend (g)</td>
<td>4.2</td>
<td>-24</td>
<td></td>
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<tr>
<td>Le Temps (f)</td>
<td>7.8</td>
<td>-19</td>
<td></td>
</tr>
<tr>
<td>SonntagsBlick (g)</td>
<td>5</td>
<td>-7</td>
<td></td>
</tr>
<tr>
<td>AZ Medien</td>
<td>Average</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>Aargauer Zeitung (g)</td>
<td>6.5</td>
<td>-12</td>
<td></td>
</tr>
<tr>
<td>Schwiss am Wochenende (g)</td>
<td>6.6</td>
<td>14</td>
<td></td>
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<tr>
<td>NZZ Medien Gruppe</td>
<td>Average</td>
<td>7.4</td>
<td>11</td>
</tr>
<tr>
<td>Luzerner Zeitung (g)</td>
<td>6.5</td>
<td>-12</td>
<td></td>
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<tr>
<td>Neue Zürcher Zeitung (g)</td>
<td>8.1</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>NZZ am Sonntag (g)</td>
<td>7.7</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>BaZ Medien</td>
<td>Basler Zeitung (g)</td>
<td>6.8</td>
<td>25</td>
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<tr>
<td>Somedia</td>
<td>Die Südostschweiz (g/f)</td>
<td>6.6</td>
<td>1</td>
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<tr>
<td>Weltwoche AG</td>
<td>Weltwoche (g)</td>
<td>7.2</td>
<td>76</td>
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</table>

**FIGURE 2.3.1** Volume and tonality of news coverage of different media companies and outlets
scores. Coverage in news outlets of Tamedia ranged from −61 (Le Matin) to −9 (20 Minuten), in NZZ Mediengruppe’s outlets from −44 (NZZ am Sonntag) to −21 (Neue Zürcher Zeitung) and in Ringier’s outlets from −50 (SonntagsBlick) to −30 (Blick am Abend). It was only the programs of the public service broadcaster SRG (SRF and RTS) and the two outlets of AZ Medien that showed relatively homogeneous tonality scores. All in all, we can conclude that there seemed to be leeway for individual news outlets belonging to the same parent company in reporting about “No Billag.”

However, to better determine whether and how media companies affected news coverage in general, we used an ordinary least square regression model, which integrates the possible explanatory factors outlined above.

In the model displayed in Table 2.3.2, we find evidence both supporting the importance of media companies and supporting the importance of news outlets. First, fewer positive news items were published closer to polling day (B = −0.037; P = 0.035). This is not surprising, as it also mirrors the development in opinion formation according to survey results published during the campaign. Second, longer articles tended to go hand in hand with more negative tonality towards “No Billag” (B = −0.017; P = 0.007). Third, media as source of tonality had an effect (B = 0.175; P = 0), which we discuss below. Finally, the language region did not have an effect (B = −0.037; P = 0.372). One could have expected a stronger rejection in news outlets published in “minority” regions, since they would be

<table>
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<th>TABLE 2.3.2 Factors explaining tonality towards “No Billag” initiative</th>
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<tr>
<td>Linear regression for stance on “No Billag” (index)</td>
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<tr>
<td>Predictor category</td>
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<tr>
<td>-----------------------------</td>
</tr>
<tr>
<td>intercept</td>
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<tr>
<td>Control</td>
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<tr>
<td>adj. R2</td>
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more negatively affected by the abolition of the license fee (market failure in smaller media markets). The effect did point in the expected direction, but it was not significant.

On the organizational level, three out of six factors turned out to be significant. Ownership of radio and television stations which receive funding from the license fee significantly reduced the number of news items supporting “No Billag” (B = –0.13; P = 0.006). Media companies in competition with the SRG in the television sector—which applies only to AZ Medien—published a higher number of articles supportive of the initiative (B = 0.155; P = 0.03). However, economic partnership with the SRG—which applies only to Ringier—did not lead to more negative coverage (B = 0.057; P = 0.506). Competition with SRG in the online sector did not have an impact either (B = 0.044; P = 0.583).

An individual outlet’s usual political stance also had a significant effect (B = 0.006; P = 0). Tonality towards “No Billag” can, therefore, be partially explained with how news outlets usually cover national votes from a political perspective. The results indicate that a news outlet’s typical right-wing stance led to more support for the “No Billag” initiative, which politically was also supported only by right-wing and libertarian actors. Thus, news outlets tended to conduct their “No Billag” coverage from a political stance (if they had one) that was similar to the one they took during other referendum campaigns. For Basler Zeitung and Weltwoche—owned by right-wing populist politicians—this reflects their power rationale. However, because most outlets have no or only mild political stances, the results indicate the low importance of a clear power rationale.

Finally, the typical quality of a news outlet did not play a role in determining the tonality (B = 0.01; P = 0.614). Some of the news outlets with above-average quality scores rather showed support (e.g., Weltwoche), while others showed rejection (e.g., Le Temps); similarly, tabloids with low-quality scores clearly showed rejection (e.g., Blick), while low-quality free sheet papers conducted a less negative reporting (e.g., 20 Minuten).

Tonality also depends on the source of tonality (Table 2.3.2). When intervening in the debate, whether through commentary or through explicit evaluations in news reports, the media voiced less criticism towards “No Billag” than through articles that mainly described positions and arguments by political actors (e.g., reports on a party’s press conference). From a normative perspective, there are two ways to interpret this finding. In a positive way, the less negative tonality scores in media-driven news could indicate journalists’ attempt to actively balance the news and underline their authority against the majority of political actors, which were by a vast majority against “No Billag.” In a negative way, we could interpret this as the media’s attempt to claim discursive power in an unstable situation by attacking mainly the public service broadcaster as a possible cause for media’s problems. Thus, some media might not have wanted this initiative to actually be accepted—hence the overall negative tonality scores—but, like strategic voters, they might have wanted to give the initiative some support in order to threaten the public broadcaster. Upon a closer reading of comments and news analyses, there is more
support for the second, more negative interpretation. Journalists’ engagement with the initiative was done mainly through a national lens, with relatively few explicit references to developments or the role of public service broadcasting in other countries or to global challenges coming from the tech companies. This ultimately means that public debate as a whole and journalists in particular did not fundamentally address the global processes and dynamics that empirically affect national media systems.

**Conclusion**

Although they represent some of the most trusted media organizations, public service broadcasters, such as the BBC, German ARD, and Danish DR, are under attack from political actors and private media companies in many Western countries. The “No Billag” initiative in Switzerland, which threatened to abolish license fees for public service broadcasting through a binding popular vote, is a particularly good example to test how various interests and rationales of media companies—the power, public, or profit rationales—affect news coverage on a highly relevant media policy issue. Not only did interests of media companies differ from each other, but some media companies even had conflicting interests. Furthermore, the “No Billag” vote was both a special case for journalists, as it directly affected them, and a normal case, as journalists in Switzerland frequently cover direct-democratic campaigns.

Our content analysis showed that, overall, media coverage was very critical of the “No Billag” initiative, in line with the vast majority of political actors who spoke out against this proposal. But our analysis revealed large differences in tonality toward the initiative. As expected, economic (self-)interests of media companies were reflected in news coverage, showing the impact of the profit rationale. Competition with the public broadcaster in the television sector or ownership of TV and radio stations supported by the current license fee went hand in hand with reporting that was slightly less critical of the “No Billag” initiative. However, differences within media companies were clearly visible, suggesting internal diversity within media companies and thus some autonomy for journalists from media management.

Furthermore, differences among outlets show that the political stance reflected in an outlet’s coverage of “No Billag” debate was very similar to its reporting on preceding direct-democratic votes. Thus, news outlets with a more right-wing stance, for instance, showed more support for the abolition of the license fee, but in line with their general stance, they had also consistently shown more support for right-wing policies (e.g., lower taxes) in covering previous votes. We can interpret this finding in a dual way. On a more positive side, we could argue that news outlets followed established patterns when covering “No Billag.” Journalists were not instrumentalized (too) much by strategies of political actors during this specific campaign nor by economic interests of their media owners. In that sense, reporting on “No Billag” was done in a routine mode. Especially in view of the fact that the political stance of most news outlets was not very pronounced, we could even argue that many news outlets strived to serve the public interest. More negatively,
however, we could argue that a regular and repeated slant, which was clearly visible in some of the outlets, is problematic if we follow the norms of objectivity and balance within single media outlets. Most obviously, this applied to Wettwoche, owned by right-wing politician Roger Köppel, and to Basler Zeitung, then-owned by right-wing politician Christoph Blocher, both members of Switzerland’s largest party, the SVP, which officially favored “No Billag.” In sum, some patterns of news coverage revealed the usual structural constraints that journalists are faced with and the usual logics according to which journalists cover the news.

The fact that media attention was extraordinarily high and almost spiraled out of control illustrates the character of “No Billag” as a critical incident. In a very intensified form of “journalistic metacoverage” that dominated the news cycle for several months, journalists heavily engaged with “No Billag” as a policy proposal with potentially far-reaching consequences for journalism. They debated the current status of the media system and its highly uncertain future, with public service broadcasting, operating in the public rationale, possibly coming to an end abruptly. In a form of boundary work, journalists debated what journalism without public broadcasting would look like and whether their field would then be shaped more by media operating in the power or profit rationale and thus be influenced more by political actors and commercial interests. But despite this reflexivity, our analysis suggests that political and commercial interests were not completely absent from media coverage.

Furthermore, news coverage about “No Billag” seemed to indicate journalists’ self-centeredness in a specific media system. Journalists framed the “No Billag” debate mainly through a national, domestic lens, focusing on the performance and the costs of the public broadcaster instead of engaging with global factors affecting Switzerland’s small media system. Our study is limited, of course, to the actual patterns of news coverage in this specific case at this moment in time. But assuming that media companies use public debate as a power resource in policymaking (Ali & Puppis, 2018), one implication is that, the relative silence on the role of digital intermediaries in news coverage, which we observed for the “No Billag” debate, will also make global perspectives and possible regulation of these intermediaries less likely. Clearly, research which sets this critical incident in relation to previous and upcoming media policy decisions and that connects analyses of news coverage with policy analyses is needed to get a more holistic view of power relations in media policy.

Note

1 Since there are no quality scores available for Tribune de Genève, we used quality scores of its “sister” paper, 24heures, which shares with Tribune de Genève most of its domestic reporting. Also, for the public broadcasters SRF (German) and RTS (French), we combined quality scores of its different news outlets and built an average score. Thus, SRF received an average quality score on the basis of its news shows Tagesschau and 10vor10 and its news site srf.ch/news. For RTS, we used the average of its news show Le Journal and its news site rts.ch/info.
References


2.4

“YOU CAN’T RUN AWAY FROM THE TRUTH”

Journalistic reflections of enduring injustices that shape news-making in Kenya

Irene Awino

On March 2, 2006, a late-night raid at the offices of The Standard Group—a leading media company in Kenya—left journalists and Kenyans in shock. The government was believed to be behind the attack after the Internal Security minister explained that the media organization was raided because “it was planning to publish and broadcast a series of stories that were damaging to the government, and that would compromise national security” (Onyango, 2018, para. 5). The raid was condemned locally and internationally, but similar to other cases of state-sanctioned injustices, it fizzled out of public consciousness, overshadowed by a blanket image of Kenya as an “island of peace.” However, the violence and bloodshed that followed the December 2007 presidential elections, in which more than 1,300 people were killed and over 500,000 uprooted from their homes, was a moment of reckoning for many Kenyans that illuminated deep divisions threatening peace and stability in the country (CIPEV Report, 2008; Truth, Justice, and Reconciliation Commission, 2013).

Following the violence, a period of transition ensued, which involved investigations into past historical injustices that are believed to have contributed to the crisis. Public discourses about Kenya’s dark moment have revolved around personalities (mostly prominent politicians), and there has been a dearth of scholarly attention on journalistic engagement and participation. A spotlight on Kenyan journalists is important for a number of reasons. First, journalists were blamed for inflaming tensions between different ethnic groups. In fact, one journalist was indicted at the International Criminal Court (ICC) on charges of inciting hatred and animosity. According to the Commission of Inquiry into Post-Election Violence (CIPEV), a senior official in the Information and Communications Ministry testified that in the run-up to the 2007 election, some media companies took advantage of new media laws to “operate freely and sometimes recklessly and irresponsibly, including using individuals who were not trained journalists, who
were partisan, and sometimes were politically biased” (CIPEV Report, 2008, p. 296). Second, some journalists were threatened over their reporting of prominent politicians who had been adversely mentioned in investigations by the ICC and had to flee Kenya for fear of losing their lives (Ombara, 2018). Third, intranewsroom tensions among journalists arose over their role in the build-up to the violence. Finally, journalists in Kenya cannot be removed from Kenya’s culture of impunity as evidenced by the attack on The Standard Group.

That scholarly debates surrounding Kenya’s post-conflict period have minimally addressed journalistic roles in this transitional context is problematic. The centrality of journalism in a society cannot be overstated, yet the news media’s roles in transitional contexts often go unexplored (Laplante & Phenicie, 2009). This peripheral treatment of journalistic engagement in transitional moments uncritically assumes their normative professional roles and erases their experiences as critical actors before, during, and after violent conflict. Journalists consider themselves as authoritative sources of information but whose boundaries have largely remained unexplored and unquestioned (Zelizer, 1992). This study views Kenya’s post-election violence as a critical incident in journalism by examining how journalists retell the workings of their cultural authority to reconstruct public perceptions of their relations with power.

**Media and transitional justice**

The United Nations defines transitional justice as “the full range of processes and mechanisms associated with a society’s attempt to come to terms with a legacy of large-scale past abuses, in order to ensure accountability, serve justice and achieve reconciliation” (United Nations, 2010, p. 2). Transitional justice processes traditionally entail truth-seeking, reparations for human rights violations, criminal prosecutions, gender justice, memorialization initiatives, and institutional reforms (International Center for Transitional Justice, n.d.). A “truth commission” is the most common form of truth-seeking mechanism, and numerous such processes have occurred around the world in the post-World War II era. Truth commissions typically constitute restorative justice, while criminal trials demonstrate retributive justice (Laplante & Phenicie, 2009; Llewellyn & Howse, 1999).

Access to information before, during, and after conflict shapes the public sphere in society (Laplante & Phenicie, 2009). The traditional role of newsmakers as influential sources of information comes into question when their professional identity is juxtaposed against that of peacemakers or war mongers. The International Criminal Tribunal for Rwanda (ICTR), for instance, convicted media leaders and journalists for “inflaming the public to commit acts of genocide” (United Nations International Residual Mechanism for Criminal Tribunals, n.d., para. 5). In another context, televised criminal trials at the International Criminal Tribunal for the former Yugoslavia (ICTY) were “often subject to misinterpretations or clear manipulations by politicians and their allies within the media” (Ahmetašević & Matic, 2014, p. 212).
In their comprehensive study of the post-conflict media ecosystem in Serbia, Ahmetašević and Matic (2014) explored how a legacy of media under state capture in the region shaped the mediated representation of war crimes trials of prominent political leaders. Elsewhere, the Peruvian media under the regime of dictator Alberto Fujimori suffered repressive attacks, which later shaped coverage of the Peruvian Truth and Reconciliation Commission (PTRC). Indeed, the Commission’s report left the country polarized, and the resultant tensions were attributed, albeit indirectly, to the news media’s failure to “adequately mediate conflicting views of a country’s history” (Laplanne & Phenicie, 2009, p. 252). Media reports largely focused on scandals while “offering merely superficial information without digging into the deeper issues” (Laplanne & Phenicie, 2009, p. 269). Perhaps the most studied transitional justice context has been the Truth and Reconciliation Commission hearings in post-apartheid South Africa. Media coverage of the Commission’s public hearings were hailed as a participatory national experience (Verdoolaege, 2005).

Transitional justice contexts, therefore, require an examination of the news media’s role as a tool for truth-seeking, reconciliation, and healing (Laplanne, 2015). In most cases, harnessing the media for reconciliation during transition has been a challenge in contexts where the media had a role in exacerbating the conflict and reflecting the dominant views of rival factions (Price & Stremlau, 2012). In several transitional justice contexts studied, there had been ongoing conflict for many years. In the Kenyan situation, however, before the conflict the prevailing perception internationally was that Kenya was a peaceful country, with a vibrant media ecosystem. The post-election violence was an unprecedented moment of reckoning.

**Journalism in Kenya**

The media in Kenya have been characterized as generally free and vibrant as compared to other countries in the war-weary central and Horn of Africa regions. Nevertheless, studies have shown that historically, post-independence regimes in Kenya co-opted the news media into advancing state propaganda disguised as the promotion of national development and security (Ogola, 2011). Under the one-party rule of President Daniel Moi, the Kenyan media were subjected to state repression where state agencies cracked down on dissent and punished perceived political enemies (Ireri, 2017; Ogola, 2011). There was hope for an expanded public sphere with the advent of a multi-party political system in 1991, which opened up space for privatized media to shape public discourse. Since then, Kenya is viewed as having a vibrant media industry (Ireri, 2016), albeit one that is hyper-commercialized and concentrated in the hands of a few rich and powerful people (Wasserman & Mawe, 2014; Workneh, 2016). Media concentration and cross-media ownership have left the news media interlocked in a complex power structure of corporate duopoly and dominance of the *Nation Media Group* and *The Standard Group* (Ogola, 2011; Workneh, 2016). Kenya has also seen a rise in several media firms and the continued growth of community radio for access to non-urban
audiences, but these give a false impression of plurality in the media scene (Wasserman & Maweu, 2014), as the two firms control a large share of the print, broadcast, and digital media markets. This commercialization and conglomeration of media interests intersect with ethnicity (Wasserman & Maweu, 2014) and gender and class (Alidou, 2011; Kareithi, 2013; Steeves, 1997; Steeves & Awino, 2015) to influence news-making cultures in Kenya.

In Kenya, political journalists enjoy a coveted status among their peers (Kareithi, 2013) due to their interactions with powerful news actors. In a country that has undergone tragic events such as assassinations, massacres, ethnic violence, terror attacks, and mega-corruption, the mainstream media in Kenya have cultivated strategies of survival (Ogola, 2011). In some instances, the news media have shown courage in the face of pressure from competing interests. In other instances, some senior managers, advertising executives, and administrators have succumbed to political and market pressures that have influenced gatekeeping (Muli & Aling’o, 2007) owing to their subservience to the elite political class and Kenya’s executive, legislative, and judiciary branches of power (Mutere, 2010). Cases of corruption and self-censorship are also not uncommon, a vice that journalists admit has affected objectivity in news production (Ireri, 2016). This state of unpredictability and inconsistency in news-making culture held sway for so long that the raid on the Standard premises fizzled out of consciousness ahead of the 2007 election. Nyamnjoh (2009) attributes this phenomenon to the media’s “Jekyll-and-Hyde personality,” wherein journalists “propagate democratic rhetoric in principle while at the same time promoting the struggles for recognition and representation of the various cultural, ethnic, and sectarian groupings with which they identify” (p. 63).

**Post-election violence as a critical incident in Kenyan journalism**

If the *Standard* raid of March 2006 shocked the country and revealed the extent of state repression, the post-election violence was a critical moment for journalists to confront the prevailing news culture with their “truth.” As media systems mirror the social and political structures within which they operate (Siebert et al., 1956), political upheavals can be disruptive to news-making practices, necessitating the need for journalists as an interpretive community “to authenticate their legitimacy through narratives and collective memories” (Zelizer, 1992, p. 9).

Kenya’s post-election violence was a turning point for local journalists to reconstruct their taken-for-granted identity as Kenyans and as media personnel. An ability to self-assess during Kenya’s transitional moment could be seen as a step toward healing and reconciliation. The Kenyan Truth, Justice, and Reconciliation Commission (TJRC) noted that the post-election violence offered an opportunity for Kenyans to re-examine the institutionalization of impunity and abuse of power. Some of the issues the TJRC investigated included massacres, political assassinations, extrajudicial killings and forced disappearances, detention, torture and ill-treatment, sexual violence, land and conflict, economic marginalization, mega-corruption, and economic crimes.
As Kenya approached the 2013 presidential election, journalists were co-opted into a campaign of peace messaging. Galava (2018) refers to this as an emergent form of news culture that was meant to flatten “conflict from political stories in a deliberate attempt to institutionalize a new (apolitical) ethos in election coverage” (p. 313). According to Weighton and McCurdy (2017), Kenyan journalists practiced peace messaging as a form of self-censorship in the 2013 elections out of fear that a repeat of the 2007 violence would occur. Such arguments on what I would call “egg-shell journalism” do not address the repressive structures that have historically contributed to contradictory and inconsistent journalism from the vantage point of journalists themselves. Sole focus on the peace messaging ahead of the 2013 elections erases journalistic reflections about their work in producing “official truth” as news. As journalists participate in a truth-seeking process, their “truth” shapes nuanced understandings of their professional boundaries amidst a political crisis.

Professional boundaries, authority, and identity

This chapter employs a thematic-inductive analysis of testimonies from six journalists and a media CEO who appeared before the TJRC to testify about the post-election violence and Kenya’s record of historical injustices. In an unprecedented move, these journalists sought to reconstruct and rearticulate their professional boundaries, authority, and identity in Kenya’s post-independence media system. The TJRC held the public media-themed session in Nairobi. Transcripts of the hearings were obtained from the website of the Seattle University School of Law under a digital commons license. The transcripts are part of a trove of documents relating to the work of the TJRC deposited on the website by Professor Ron Slye, who was one of the commissioners at the TJRC. The TJRC final report was received by the president in May 2013 but has never been made public.

After an initial reading and a close re-reading of the transcripts, I analyzed the data using an inductive grounded coding process. Through initial coding, I dissected the data into in vivo codes. A focused axial coding unveiled salient themes from the data (Charmaz 2006). These themes were then refined and arranged into categories using Attride-Stirling’s (2001) thematic network analysis.

The public oral submissions were opportunities for journalists to rearticulate their experiences, contributions, and challenges that had shaped journalism culture before, during, and after the post-election violence. Having been blamed for incitement, journalists had the chance to represent themselves as victims, survivors, and witnesses of Kenya’s history of injustices. The following represents a sample of refined themes.

Journalism as a “face of suffering”

Testimonies presented during the public hearing painted a grim picture of journalists’ welfare in Kenya during the period under investigation by the TJRC (1963
to 2008). The testimonies portrayed journalists as victims of exploitation, poor employment terms, harassment, trauma, torture, insecurity, unlawful detentions, physical attacks, murder, forced displacement, manipulation, threats, intimidation, and disappearances. While the TJRC was told that Kenya had been a refuge for journalists fleeing repression in neighboring countries (such as Eritrea, Ethiopia, Somalia, Sudan, and Uganda), Macharia Gaitho of the Editors Guild warned that “there are still these dangers … there is no guarantee that they cannot happen again as we move to another critical period.”

Journalists expressed poor working conditions of correspondents, who were contracted journalists working for news organizations outside Nairobi and are critical in gathering information from grassroots sources. Although terms of employment vary from organization to organization, correspondents are generally paid for stories published, not submitted, with the price ranging according to story placement. William Janak, chairperson of the Kenya Correspondents Association, explained this predicament:

Correspondents are largely not on permanent employment. That alone represents a face of suffering. Essentially, they are being exploited. When they are out in the field, they are not facilitated well. During conflicts, they bear the brunt of the conflict. Over the years especially the period that the Commission is dealing with, the correspondents have suffered a lot because they are at the center of the conflicts that we have had in this country.

This face of suffering turns the “vibrancy” narrative of Kenyan media on its head. It also attaches a culture of fear to news production and explains the strategies of survival, such as peace messaging.

The testimonies represented journalists as “targeted enemies” by people in power, a situation made worse by the failure of State security apparatus to protect journalists, leaving them vulnerable to threats and attacks and disrupting their lives by making them flee or hide: “In Eldoret, some of our colleagues had to hide in offices for two weeks because they could not go home. One of them was nearly killed by a mob. The police were there and they did not intervene” (William Janak). During the post-election violence, journalists suffered injustices, especially over their reporting of the Kenyan cases at the International Criminal Court. Some had to flee and hide, while others lost homes and property. Others vowed to never return to their workstations for fear of violence:

After post-election violence, we recorded cases of trauma that journalists went through. These are personal testimonies. The case of that journalist in Eldoret who nearly died by the mob is here. This is called killing the messenger … during that period, we had journalists whom we referred to as Internally Displaced Journalists (IDJ). Some fled from Narok or Nakuru and have never returned back to their places of work.

(William Janak)
Journalism “by the city, for the city”

During the TJRC’s tenure, it became clear there was a disconnect in social experiences between Nairobi, the capital city of Kenya, and the rest of the country (especially non-urban settings). Commissioners acknowledged that their public hearings had revealed biased treatment in the media that favored stories from Nairobi and the major towns close to it. It made residents in other regions feel completely marginalized in the mainstream news. Macharia Gaitho attributed this disconnect between journalists at the city desks and those in the bureaus to “their different ways of seeing news,” which explains why news reporters were sometimes sent from Nairobi to cover big breaking news even if there were correspondents in the area:

Quite often, we find that the correspondents out there do not see the story. That is a big problem we face with the correspondents in the field. It so happens that when you are in a certain place, which is the way things are, you do not see a story in what, to you, is part of the normal conditions.

(Macharia Gaitho)

The Nairobi connection in news-making places the city at the center of power where key decisions are made and where stories become news. As the TJRC chairperson commented, witnesses who had testified in other public hearings outside Nairobi “thought that they are the only ones who have suffered historical injustices in this country,” but as the media covered their stories after the post-election violence, “they realized that they are not the only ones who have suffered.”

The media’s coverage of the TJRC hearings thus connected Nairobi with the rest of the country. The Editors’ Guild chairperson expressed that there would be a radical shift in news production as governance devolves to the counties: “Nairobi will no longer be the center of everything. Every media is running to strengthen its presence outside Nairobi in the counties. So, counties will be the new centers. That is where most of the news will be generated. That is the shift we are talking about.”

The fact that Nairobi is Kenya’s center of economic and political power aligns with the imbalance in understanding of news between the city and the counties. Therefore, the power relations between the Nairobi-based journalists and those working outside the city is tilted in favor of the city desks, where key decisions were made. The TJRC decision to hold the media hearings in Nairobi also supports Nairobi as a center of the media system.

Journalism under state repression

Journalists at the TJRC hearing also pointed out a legacy of State interference in media work: “There is need to catalogue and tell the story of State interference to media freedom through independence. We have a situation where private media houses were forced into co-option by the State” (Jaindi Kisero). State security and intelligence agencies were frequently mentioned as constant threats to journalistic
freedoms in Kenya. These include the police, administrative officers, private security on hire, and even thugs, goons, assassins, and militia hired to target journalists:

The police are used by the politicians or influential people when (news) stories are published or when they are still under investigation. On the other hand, police officers blacklist journalists who expose them on corruption, misconduct, abuse of human rights or failure to do their duty.

(Waigwa Maina)

Worse still, these security agents get away with impunity against journalists perceived as enemies. Non-state political actors, too, have always targeted journalists they deem to be against them. This is especially common during election campaigns:

We have all kinds of political parties and political leaders who have an interest in what the media is saying about them or about their opponents. I think our politicians operate on the principle that “if you are not with me, you are against me.” For them, the issue of balance and fairness does not make sense; either you support me, if not, it means you are against me.

(Macharia Gaitho)

State targeting is an enduring tactic that successive governments in Kenya have used to malign journalists seen as uncooperative. After the 2006 Standard Group raid, the Minister for Internal Security, John Michuki, threatened that “if you rattle a snake, be prepared to be bitten by it” (Onyango, 2018). The minister’s warning captures the media institution as an ideological state apparatus (Althusser, 1971) that the state uses as an instrument of repression.

**Journalism “of front-page dominance”**

The testimonies at the public hearing alluded to how Kenyans had been subjected to a political news culture in which the voices of politicians, the elite class, state agencies, and prominent personalities were dominant as news sources and how this had implications on the reproduction of injustices perpetrated/enabled by the same dominant voices. In fact, these dominant voices had always enjoyed front-page news.

The mainstream media and even the media consumers in Kenya have actually been socialized in terms of consuming more political news over the years. This has defined how the media often looks at news. If you put something that is agriculture-based and something apolitical (on the front page), perhaps your newspaper will not sell on that day.

(William Janak)
However, while the journalists decried the socializing role of the media-political class alliance, the editors and managers seemed to pass blame on the Kenyan audience for electing these leaders.

We have seen the political class every year rallying supporters and causing them to elect leaders who you wonder why we would elect them in the first place. So, I think Kenyans are themselves to blame if they elect leaders who are not fit and proper to run for offices or who cannot contribute to good governance in this country.

(Paul Melly)

This front-page dominance by elite politicians underscores the routinization of journalistic processes that privilege the rich and powerful. The dominant treatment of the elite class in the news became a challenge during the transitional period when prominent news sources were adversely mentioned in the TJRC investigations, including the credibility of the chairperson who had stepped down at the time of the media hearing session.

**Journalism “of owners, favors, and profits”**

Testimonies at the hearing confirmed deeply structured commercial interests as a major factor in the work of the news media in Kenya. It also emerged that some senior journalists were shareholders in the media companies they worked for: “They want to survive in the market. They are under pressure to sell. Some of them are shareholders, owners” (William Janak). The TJRC also heard that there was always pressure from advertisers to influence news for favorable editorial content.

We will always have situations where big corporations and big advertisers expect to be treated leniently; expect special treatment; expect that anything wrong they do, they will not be exposed, and they always have a very powerful weapon. They withdraw their advertising. That is a big pressure on editors and reporters and it always put editors and reporters at odds with the commercial side of the business.

(Macharia Gaitho)

A major challenge for newsrooms would arise when these advertisers retaliated against any unfavorable editorial treatment. For example: “The retaliation takes the form of stopping advertisement as leverage to dictating favorable editorial content. The area of tension largely is a commercial interest where the commercial interests of the shareholders may be inconsistent with public interest” (Paul Melly). Journalistic testimonies confirmed how editorial processes aligned with the dominant coverage of the political class and their competing interests. Journalists also acknowledged that media routines had contributed to a form of indirect censorship and conveyor belt interpretation of events as “he said/she said” news.
**Journalism “under legal chains”**

Another theme that surfaced during the hearings was how Kenya’s history of retrogressive media laws and regulations has inhibited press freedom:

The legal and regulatory framework for interaction between the State and media was coined in the colonial days. That framework has not changed over the years … There is the Penal Code which creates sedition. Sedition operates on the premise that people can be imprisoned for things that they say. We have the Books and Newspapers Act and many other laws.

*(Jaindi Kiser)*

The legislative and executive arms of the Kenya Government have worked to censure media organizations by refusing to change these laws and even create new ones with the intention to impinge on press freedom. Also articulated at the hearing were complaints against the Judiciary, where courts have abused regressive laws to “punish” journalists and their news organizations by awarding defamation suits to claimants: “The Defamation Act and libel laws exist all over the world, but in our experience, the way in which defamation inhibited press freedom was the large court awards that they gave to a claimant that nearly bankrupted institutions” *(Jaindi Kiser)*. These defamation suits always benefited elite actors to the detriment of news organizations:

With respect to quantum of libel awards, we have seen a consistent rise in amounts that do not give the impression that the intention is to make it punitive and deterrent to recklessness as far as management of editorial function by the media houses is concerned; they are actually intended to have the consequences of financial paralysis and cripple media houses.

*(Paul Melly)*

Operating under this climate of retrogressive regulatory framework—characterized by media laws that had been used by the state to gag the press—journalists had resorted to self-censorship to avoid lawsuits. This, again, ensured a culture of impunity where news subjects saw the courts as an avenue to hit back at the media.

**Journalism “of envelopes” to subvert the truth**

The presenters also rearticulated the common assumption that journalists were beholden to actors who capitalized on their poor pay to offer gifts in exchange for subversion of the truth: “There are PR agencies that are known to give reporters after press conferences lunch money in the envelopes – this is an indirect way of influencing them.” *(Paul Melly)*. In these testimonies, however, it was evident that not only were the poorly paid journalists manipulated through bribery, but senior editors on higher pay scales also succumbed to “brown envelope” journalism:
Corruption in the media does not just end at the correspondents’ level. There have been cases where senior journalists have also received bribes … Because of the very nature or circumstances of journalists, they are amenable to manipulation by news sources, including politicians and others who want to subvert the truth. (William Janak)

The corruption in Kenyan media has been discussed before. However, in the truth-seeking process, this was a revelation of how the vice had co-opted journalists into the oppression of Kenyans by denying them information that could lead to transformative change by holding the powerful to account: “There is always the danger that some of us – journalists, editors, and managers in the media houses – may become captive to political forces and try to slant the news towards their favored side. That is the biggest threat” (Macharia Gaitho). The mystery surrounding journalistic corruption is another predicament for the profession because many culprits in the industry have never been taken to trial or indicted for the crime. This yet again reveals a hierarchy of interests where politicians, state, and non-state actors invade media spaces to distort the truth of news.

Conclusion

This study set out to explore Kenyan journalists’ self-assessment of their news culture using the post-election violence as a critical moment to reflect on their historical relationship with political power. Journalists, like thousands of other Kenyans, gave oral submissions before the TJRC, which was established to investigate Kenya’s historical injustices. While they expressed myriad challenges to their work—some of which are well known—a critical journalistic self-reflective framework can be used to articulate journalists’ “truths” against hegemonic “truths” about their roles, identity, and responsibilities in society to understand how their work shapes public consciousness. It is also important to note that this was the first time that journalists had appeared in a formal setting to air their grievances. Participating in the truth-seeking process was unprecedented in Kenya, as journalistic statements confronted their challenges and vulnerability to state manipulation and control (Ogola, 2011).

Notably, in the testimonies before the TJRC, some realities went unmentioned, such as the division of labor in the Kenyan newsrooms as it intersects with gender, class, nationality, tribe, age, and ethnicity. That no female journalist testified at the hearings renders the engagement with the TJRC exclusionary. Secondly, mostly correspondents testified before the commission. Correspondents are not considered mainstream news reporters; thus their willingness to participate in the truth-seeking process reconstructs their experiences as repressed, poorly remunerated, and of secondary status in the news-production chain. Thirdly, the TJRC was not told of how tribalism and ethnicity had always shaped news, especially during elections, which is also the reason some journalists had fled their homes. Finally, the testimonies failed to mention the names of powerful personalities in Kenya’s top
echelons of society, including elected leaders who indirectly manipulated the media through ownership. This kind of censorship does not foster an environment of truth in a post-conflict situation.

The truth-telling experience in this study reconstructs the notion of journalism as an “interpretive community” with “collective interpretation of key events” (Zelizer, 1993, p. 219). A critical journalistic self-reflective truth-telling approach aims for journalistic contributions to the truth-seeking process where an inclusive truth dissected the news industry to point out the strengths, challenges, and opportunities that can drive transformational storytelling. This kind of inclusive truth in transitional societies addresses intersecting forms of inequalities in the media, probes structural and ideological forces influencing media work, and checks routinization of the news-production processes that privilege the ruling elite.

For Kenyan media, this framework is analytically crucial in demystifying the news process to align with the goals of transparency, good governance, and accountability while bringing news to traditionally underserved and unreached populations. As one journalist, Waigwa Maina, testified: “it is not possible to run away from the truth … This community depends on me to highlight those issues and I have no option, but I am driven by that passion to perform my duty.”

Note
1 The TJRC held public and private hearings. This was a public hearing session.

References


On December 11, 2006, President Felipe Calderón ordered the Mexican army to send troops to areas with high levels of narcotics production and distribution. The drug cartels reacted violently, resulting in an aggressive confrontation with the government that dramatically changed the practice of journalism. Since 2006, news organizations and journalists who covered crime have directly faced the impacts of the Drug War. Reporting about the cartels, the military, law enforcement, or criminal courts became dangerous and obligated the newsrooms to change their practices. It has been reported that since 2006, 106 journalists have been killed due to the violence resulting from the war and the corruption it generated (Committee to Protect Journalists, 2020). While some of these murders are the by-product of the 2006 Drug War, others are the result of impunity and corruption. Politicians and other public officials involved in the war against cartels have targeted reporters, and they use a variety of strategies to influence or stop press coverage. Their actions include intimidation, co-option, threats, violence, and even attacks on newsrooms, especially in the areas located across the border with the US, on the Pacific and the Gulf of Mexico, and in some central northern states.

Newsroom staff facing the wave of violence embraced new actions that have impacted their journalism norms and practices. Some examples of the changes in practices taken by news organizations include: self-censorship that hinders the positive trajectory of Mexican independent journalism; scarce reporting on violence, which impacts the information needed in the communities affected; and reporter-identity protection, which does not name the journalist, impacting the collective recognition of their work.

This chapter examines how the 2006 Drug War, as a critical incident, generated a major shift in the journalism practices in Mexico. It presents the results of in-depth interviews with 25 journalists and editors that illuminate how this critical incident has impacted newsrooms. The findings demonstrate that the news
organizations have resorted to pursuing a series of strategies to protect the identities of their journalists and reporters and to increase their personal and familial safety. In other cases, those practices are rather passive strategies to avoid confrontation with those who have the power to exert pressure and commit violence on their newsroom staff.

The complexity of drug trafficking and its impact on Mexico’s journalism

In 2006, the newly sworn-in president of Mexico declared war against drug cartels. The expansion of the drug cartels in Mexico resulted from disruptions faced by Colombian cartels whose links to transport narcotics into the US had become non-operational. Colombians sought Mexican cartels to create new alliances in which the former continued manufacturing while the latter transported the drugs. From the beginning of the war, the Mexican government used all available resources to “destroy” the drug cartels, expecting that the plan would be completed within President Calderón’s six-year term. The problem with this objective was the gross underestimation of the power and reach of the cartels and their deep roots within police agencies, prosecutors, judges, and the military. As the plan was announced, cartels escalated their actions to intimidate not only the government but also communities and the public; after all, large amounts of money were associated with the trafficking of cocaine, heroin, methamphetamine, fentanyl, and marijuana (Congressional Research Service, 2019). The press was witness to the plan and continued with reporting—interviewing and citing sources. As the violence increased, the Mexican press went from being a reporter of events to a target of both organized crime and corrupt law enforcement agencies.

After years of intense and cruel fighting among the drug cartels in northern Mexico (Tamaulipas, Sonora, Chihuahua, and Baja California), in the Pacific region (Sinaloa, Michoacán, and Guerrero), and in the Gulf area (Veracruz), Mexican reporters continued to fill the TV screens and the covers of magazines and newspapers with the gruesome pictorial evidence of the violence. Mexican newsrooms actively reported the results of violence that showed the brutal fights among drug cartels, but after five years of privileged connections with reliable sources within the military and police federal agencies, informants were no longer willing to cooperate. Mexico’s press faced a non-official freezing of access to information.

As the violence increased in the first five years of the Drug War, and with no drug cartel removed or eliminated, the evidence of an extended network of corruption across various levels of law enforcement agencies became more evident. When the Mexican army arrested 106 local police officers in the northern city of Monterrey on January 21, 2012, the news circulated across the world. The information was clear: Police officers were involved in acts of corruption and in protecting drug cartels from prosecutors and the military.

Increases in drug-related homicides during the first years of Mexico’s war on drugs caused alarm across the country. The concern was that cities with low rates
of drug consumption and violence started to notice an increase in both. The evidence suggested that drug cartels, when unable to introduce their products to the US, decided to push consumption inside Mexico. By the end of Calderón’s presidency, the Mexican government was no longer holding power in some parts of Mexico; it had lost power to organized crime (Correa-Cabrera et al., 2015).

It is hard to account for the exact number of victims resulting from the Drug War. However, according to the US Congressional Research Service, close to 150,000 murders have been committed since Calderón’s time in office in 2006 to 2019 under the current President, Andrés Manuel Lopez Obrador (Congressional Research Service, 2019). Adding to the homicide victims, 37,000 people have gone missing since 2006; in other words, there are close to 200,000 victims of the Drug War (Lee et al., 2019).

The Drug War as a critical incident in journalism

Large news organizations, such as El Universal, Milenio, Reforma Group, TV Azteca, and Televisa, have their newsrooms based in the capital, Mexico City, and they used regional and local correspondents to report news about the Drug War. Some regional organizations, such as in Hermosillo, Guadalajara, and Monterrey, have their own newsroom staff, who were at the frontline of reporting from dangerous places.

From the beginning of the war, Mexican reporters covered it as first responders. In many cases, reporters worked closely behind police and military personnel in charge of an operation. This strategy proved to be deadly, as some of the reporters were killed in the crossfire. At first, the reporters did not know the power and reach of the weapons used by the cartels, and they arrived at the locations with no body protection—helmets or bulletproof vests. Given the caliber of weapons and ammunition available to the cartels and the military, the confrontation areas were literally warzones (Correa-Cabrera et al., 2015). At first, the personal safety of the reporters was not a consideration.

As violence escalated, news organizations faced another challenge: the identification of reporters. Most Mexican newsrooms printed the names of reporters filing a story, which clearly indicated who reported the event, and whether it was print or broadcast. Corrupt police officers and drug cartel leaders saw the stories as a threat, first because they showed their activities and, second, because the stories showed some cartels as weak. Most cartels wanted to be acknowledged as the top organized crime group to create an image of power. These examples illuminate how journalism in Mexico during the early stages of the Drug War became a very dangerous profession.

Newsrooms before the Drug War reported violence and narcotics by showing the actors behind the drug trade, the investigations taking place, and the legal status of those who were charged with crimes. Before the war, drug cartels’ operations took place in three major areas: the border with the US, the Pacific region, and the Gulf of Mexico. Regional newspapers, such as El Sol de Tijuana, El Imparcial in
Hermosillo, *El Mañana de Cd. Juarez, El Diario de Nvo. Laredo,* and *El Mañana de Reynosa,* covered the cartels when violence erupted or when the police or military completed a major seizure of drugs. The metro areas of Guadalajara, Mexico City, and Monterrey have their own news organizations, such as *El Universal, Reforma, Mural, El Norte,* and *Milenio,* which have had an active national agenda-setting function related to drug violence and its impact on communities. Large national papers lacking correspondents in the areas with violence depended on the information provided by local and regional reporters.

As the Drug War started, conditions deteriorated rapidly for all Mexicans but for journalists especially. While at first it was unclear whether the deaths of journalists were related to the Drug War, news organizations began to suspect that the attacks were connected. However, many of the deaths were not classified as murders but classified as deaths “on dangerous assignment” (Committee to Protect Journalists, 2020), which made identifying the connection with the Drug War difficult. Ultimately, violence against the press increased 23% between 2016 and 2017, with a staggering 276 attacks on journalists in 2017 (Committee to Protect Journalists, 2020).

The Drug War arrived as a government tool to deter the expansion of organized crime, but its impact on journalists led to adjustments in practices. As the country became one of the most dangerous places to practice journalism (Congressional Research Service, 2019), newsrooms’ awareness of their roles and perils triggered a wide deliberation of their journalistic practice. The fact that Mexican journalists doing their job became targets of both organized crime and corrupt governmental officials made the Drug War a critical incident with widespread implications for their journalism practices.

**How editors and journalists responded**

Two questions guided this research. One examines the professional training and security protocols newsrooms used to protect their journalists in Mexico. Few texts and references are available to provide professional advice to reporters to be protected when reporting crises, disasters, or critical incidents (Steffens et al., 2012). The second research question looks into the consequences facing organizations reporting the drug war and impacts on their journalism practices (Cottle et al., 2016; Harris & Williams, 2019).

In-depth interviews with editors, news directors, and crime-police reporters of Mexico’s major news organizations were conducted. Twenty-five newsroom staff members were interviewed, including eight editors and news directors and 17 reporters, columnists, and editorialists. Most interviews were conducted in person, except for three done via Skype. The sample represents eight major news organizations from all over Mexico with special focus on crime-police reporting and drug trafficking beats. The organizations include *Reforma, Milenio, El Norte, El Imparcial, El Universal, El Financiero, La Jornada,* and *El Mañana de Reynosa,* which led the national and regional agendas’ settings. The interviews focused on three areas: the
impact of the Drug War violence, the logistical strategies to continue reporting, and the changes in journalistic practices.

When editors, news directors, and producers saw the scale of the violence across communities and cities in Mexico, their attention turned to strategies to cope with violence against journalists. Never before had reporters been targets of violence from organized crime groups. The new reality required non-conventional strategies to protect newsroom staff, and all news organizations were vulnerable, especially the small media companies in areas where the violence was intense. So, at first security was the most important goal.

Initial recognition of journalists’ risks

Before the escalation of the violence in 2006, reporters simply covered any military or police operation with no personal protection and no visible identification that they were reporters or members of the press. Depending on the size of the news organization, many times the reporter was accompanied by a photographer and the two of them covered the incident. For the most part, reporters felt protected, as they were tipped-off from law enforcement agencies about the operation; sometimes they were also alerted by witnesses or members of the community who lived near the confrontation. But as the violence escalated, the newsrooms’ alarms went off.

News directors were concerned about the safety of their staff when, in 2007, they noted that in the northern cities of Nuevo Laredo and Monterrey, reporters, editors, and publishers were threatened by name. Some of the publishers continued living in their residences, but a few decided to move to another location when the threats became credible. Initially, the organized crime threats were sent as anonymous letters to the editor, but they escalated to direct letters to the senior staff, emails to the editors and publishers, and phone messages to the newsrooms.

Many of the organizations did not take the threats seriously until late in 2006, when two journalists, a reporter, and a photographer from El Norte newspaper were beaten in a suburb of Monterrey. They were reporting on a small business in the city suburbs that was notoriously visible as a drug trafficking operation, and when the employees noticed their presence, they alerted their bosses, who harassed and assaulted the reporters. The two ended up in hospital and it was clear that the threats should be taken seriously. As one editor said: “When the two reporters were beaten, we knew that we needed to develop protocols to protect our staff. We were in a completely new game, and it was dangerous.” The same editor commented that some of his staff wanted him to ask for assistance from the state attorney general’s office to carry weapons for self-defense. He did not agree with that, and the reason was simple: Criminals are trained to kill if they feel threatened, so arming the reporters carried too much risk.

A news director decided to limit the reporting of a confrontation, to after the violent events ended, not during the time of the violence, to avoid placing reporters at a dangerous location where they could be injured or killed. This worked for
some time, but the media competition forced them to rethink the strategy. “While I was concerned about the safety of my reporters, the competition was reporting ‘live’ the event. We lost several breaking news because of this.” The adjustment was not easy. The news director wanted to keep her reporters safe, but she did not want to miss breaking news: “I still insisted about covering the confrontation but safely behind police or military lines.” But there were two major problems: First, neither the reporters nor the editors have been trained for reporting in almost war zones. Second, there was no notion of personal protection for the reporter by the journalists and by the news organization. Most journalists saw their risks as exclusively linked to “on the field” reporting, not as a potential direct risk on their personal well-being. They never saw themselves as targets but as a random victim of a lost bullet.

When specific reporters were directly threatened, the situation in the newsroom again turned to seeking solutions. Some journalists had been threatened and intimated before, but this time the risks were more serious: being beaten or murdered. While this was a major concern for the editorial leadership of the news organizations, journalists, reporters, columnists, and photographers were particularly alarmed. One crime reporter of a major newspaper in Monterrey said: “My family wants me to leave this job. I know that my editors and the publisher are concerned that the sicarios can kill me any time at any place.” Others had similar views: “How can I do my job safely? Nobody is able to protect me from these predators. I was always worried when I opened emails or letters that I would be a target,” another journalist said. Thus, reporters’ names were replaced by “Staff Report” or “Newsroom Report” in the major newspapers of Grupo Reforma: El Norte, Reforma, and Mural. While newsrooms’ actions started with improvisation, they slowly moved to a set of specific strategies.

**Newsroom responses to violence against journalists**

The attack in 2012 on El Mañana newspaper in the city of Nuevo Laredo (across the border from Laredo, Texas) had a disturbing effect on journalists all over the country. The attack showed them that the drug cartels were willing to do anything to influence or silence journalism. After that incident, journalists reconsidered self-censorship as the ultimate resource. Although not publishing or broadcasting a story was not optimal, it was the only way to ensure the safety of the staff. To protect themselves, some reporters chose to not report an event or simply provided short briefs about what happened. This solution, however, was not welcomed by other journalists, as they questioned their roles. A police reporter said: “I need to do my job. That is why I become a journalist. I need to inform the community of what is happening. This is very important … But at what cost? I don’t know.”

As fear increased among journalists, anonymity emerged as another strategy. By not identifying actors involved in an event or not referencing sources of information, the story could be published, posted, or broadcast. Almost all newsrooms reluctantly used the strategy, and some still do even today, although some journalists thought it was bad
practice. A police reporter said: “It has to be used, but it is not the best method. How can we be credible? I don’t know anybody who likes it.”

As sources became elusive, the reliance on social media also caused problems. Blogs and Facebook pages started to surge and provided information with questionable veracity or intent. Some blogs with security details were believed to be administered by the military, and when newspapers, such as the Primera Hora of Nuevo Laredo, published an anonymous blog that provided information about the cartels’ operations, the situation turned tragic. There was a belief that the blogger was the editor of the local section of the Primera Hora newspaper, and one day she was found decapitated. Despite the power of social media, the cartels were getting sophisticated enough to detect social media posts or offered rewards to identify the authors or administrators of the sites.

Newsrooms were caught between organized crime and law enforcement and were not prepared for the challenges, improvising as circumstances evolved. Protection of reporters became a first priority, and concerns about how journalism practices would be impacted were secondary. One managing editor of a major newspaper in a border town said:

Actually, some of the norms are just adapting. It is safe to provide indirect references and descriptions of the events. Now we don’t name the cartels unless we are asked by the police. Or we identify them when the police issues press releases and they recognize the drug cartels involved. Norms of accuracy, objectivity, professionalism, source checking, and fairness have not changed at all. Maybe a bit with source verification because it is difficult to double check the information; you need sometimes to go with one source. But it is the reality of surviving in the middle of a war.

The news media in Mexico did not give up. Most news organizations created toll-free numbers for community members to report acts of violence, and the desk editor would decide to send reporters to cover the incident if needed. If, for safety reasons, the editor decided not to send reporters, they would monitor police and emergency communication channels and check whether one of the newsroom staff knew someone close to the event to ask for details, photos, or videos.

Lessons learned from the Drug War

The impact on journalists of the Mexican Drug War has taken many forms. Some reporters have been intimidated and threatened constantly, others have been beaten, and, worse, some others have been killed. A few reporters have been forced to collaborate with criminal groups and provide disinformation about government operations because they received threats, which provoked distrust and hostility from law enforcement agencies. As a response to this violence, Mexican newsrooms resorted to different strategies: not identifying journalists by name, self-censorship, anonymity, and even relocation.
The lessons learned are primarily related to issues of preparedness. Not one news organization was prepared for the targeted violence against journalists. As one editor put it: “Nobody saw this coming. We thought that the attacks would be between the cartels and law enforcement, not against us.” When the newsrooms witnessed the realities of reporting on the Drug War, they scrambled to find solutions as the challenges arrived, first with improvisation and later by learning from other journalists facing similar conditions, such as strategies from Colombian reporters during the War on Drugs from the early 1980s to the late 1990s. One reporter said: “I knew two reporters from Colombia, and I called them and asked for ideas. Not all of them were applicable, but some were rapidly adopted, such as not making public the reporters’ names.” Another strategy from other newsrooms’ experiences was to provide personal equipment to protect reporters and photojournalists in the field. An editor said:

We have taken some steps for personal protection, such as wearing helmets and bulletproof vests. Yellow vests are also recommended, but reporters don’t like them because they believe they are more visible targets. More importantly, we asked our reporters to always be behind the police lines. No photo or video is worth a life.

One strategy that caused divisions among journalists was self-censorship. While they used it sporadically, most respondents agreed that silence is not a solution. It is a constant dilemma for editors to decide whether to publish a story that could provoke an attack on reporters. Editors admitted that they have stopped a story or ignored an incident because of the potential consequences. However, as in the shootout in Reynosa in 2013, for example, local newspapers were self-censoring by not reporting the incident. Small local and regional news organizations are more prone to use this strategy as opposed to those in large cities or from large national news organizations.

Anonymity has been seen as a vehicle to keep the public informed about the events in the Drug War. While most information is accurate, the stories don’t reflect names, location, sources, and other identifiers. As one reporter said: “Some of the consequences of the muffled reporting on the Drug War is the shallow and superficial reporting that creates distortions and misunderstandings of drug trafficking in Mexico.” However, this is a continued practice that will not change while attacks on the press continue.

One strategy that got attention but not much traction was the support of international organizations such as the Committee to Protect Journalists. Other actors, such as Mexican and Latin American human rights watch organizations, raised awareness and pressured the Mexican government for laws to protect journalists. Relly and González de Bustamante (2017) examined efforts to protect journalists from attacks and found mixed results, as the legal framework is reliant on people reporting killings, and journalists are skeptical of being protected because of the corruption in the judicial system. Despite doubts, the link between international advocates and Mexican journalists’ professional organizations helped to increase the
pressure on Mexico’s governmental response to reduce violence against journalists (Relly & González de Bustamante, 2017).

Another less-used strategy was to relocate reporters. Large news media organizations with offices in different parts of the country offered relocation as a solution because they could not guarantee journalists’ safety. Journalists who relocate often lose their family and social relations, which causes isolation and guilt because they put their loved ones in danger and because they may be perceived by their colleagues as deserters. Not many have opted for relocation; however, others have left the profession.

When editors were asked whether norms have changed in the newsroom, the answer was an emphatic no. A publisher at a major news organization said:

Norms have not changed at all … Every reporter covering the crime section does the same professional job. We use different strategies but not changing the objective of what we need to do. Our journalism principles have not changed because informing the public is our priority and we will keep doing it for years to come.

An outcome of the new laws protecting journalists is the increase in in-depth journalism. This is the result of access to court documents, including police and other law enforcement reports that describe the actions of the cartels or corrupt officials. Despite the time needed to produce in-depth stories, the cases are so numerous that newsrooms have piles of stories waiting in the docket. Many articles have been able to identify actors and connect the actors to organizations, reducing anonymity and self-censorship.

The Drug War has also taken an emotional toll on reporters, a less visible but equally important impact. One editor recognized emotional issues as a problem for the newsroom staff:

I know that my reporters are stressed and mentally pressured and even fearful, but at this moment the only thing I can do is that when I notice any sign of discomfort or doubt on covering an assignment, I just give it to someone else.

You need to understand that what they witness is going to stay in their heads forever, and the images, smells, and sounds are not pleasant.

The attacks on journalists in Mexico have impacted newsroom practices, while norms have remained in place, such as accuracy, objectivity, professionalism, source checking, and fairness. This chapter has illustrated and examined the strategies that editors and reporters used to cope with direct attacks on their news organizations or on reporters. Despite the difficult conditions, most newsrooms are fully aware of the compromises and acknowledge the remedies as challenging, but these compromises allow them to fulfill their responsibility to inform readers about the Drug War. They are temporary survival tactics for journalists and for journalism in Mexico.
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2.6

(RE)TELLING THE STORY

Is the Rwanda genocide a critical incident in journalism?

Florence Madenga

The story of how and when the genocide in Rwanda began depends on who and how you ask. Some say the 1994 genocide, the killing of over half a million people over little more than 100 days, was catalyzed by a plane crash in April of that year. The Rwandan president at the time, Juvenal Habyarimana; his chief of staff for the Rwandan army; Burundi president Cyprien Ntaryamira; and others were killed in the plane crash while flying over Kigali. Habyarimana had just agreed to a multi-party transitional government during a meeting of heads of state in Dar es Salaam, Tanzania. The plane was reportedly hit by air missiles from the direction of the airport in Kigali, the country’s capital city, and theories began to float around motives and culpability.

The Rwandan Patriotic Front (RPF), a party made up mostly of members of the Tutsi minority group, were opposed to Habyarimana’s regime. According to some witness accounts collected by Human Rights Watch, their military arm began marching from north of Kigali, towards the south of the country shortly before the plane crash (Des Forges, 2004). Members of Hutu moderate political groups were also not supportive of Habyarimana’s policies, and some had allegedly even discussed a coup only a few days before the crash (Des Forges, 2004). Moreover, Habyarimana’s own inner circle had a possible motive—they had openly criticized the accords that the president has signed in Dar es Salaam and feared loss of control once the regime gave more power to Tutsi and moderate Hutu politicians. Other potential perpetrators and conspirators outside the country’s borders, the French or the Belgians, had vested interests in a particular version of the Habyarimana regime (Des Forges, 2004). While mass killings of Tutsis began shortly after the plane crash, it was neither thoroughly investigated nor resolved, and its perpetrators remain a mystery.

Some may argue that the seeds of genocide were sowed generations before the 1994 massacres. Killings and pogroms often came in ebbs and flows depending on
the political environment. For many decades before the genocide, political tensions endured. The discriminatory policies penned and deployed by both German and Belgian colonialists in the late 1800s and early 1900s favored the minority Tutsi group in employment and education and included the issue of ethnic identity cards to document division and difference. After independence from Belgium in the 1960s, the Hutu-dominated Grégoire Kayibanda regime retained those policies. Finally, the Habyarimana presidency, with its one-party system, frequently sponsored campaigns against Tutsis and politically moderate Hutus (Pottier, 2004). There were many killings before 1994, with genocidal intentions. Notably, scholar Mahmood Mamdani (2002) rejects a story of “ancient hatreds” and “bizarre, savage outbursts” about the genocide. Those narratives are often mired with colonial undertones, which still exist in scholarship about the genocide as well as about the genocide’s anniversary. Mamdani (2002) and Des Forges (2004) call for perspectives more nuanced than the “Hutu versus Tutsi” vantage point.

Mamdani (2002) argues that accounts of the genocide, both in academic literature and popular narratives, are afflicted with “three silences.” The first “silence” is the tendency to speak of the genocide as if it has no history, no precedent, even in a century “replete with political violence,” so that it becomes “an anthropological oddity;” for Africans, a “Rwandan oddity” while for non-Africans, “the aberration of Africa,” as both swiftly dismiss Rwanda as an exceptional case (Mamdani, 2002, p. 7). Second is the silence engulfing the complications of agency during the genocide. Mamdani critiques accounts that only highlight the design of the genocide from “above,” in a “one-sided manner,” as “exclusively a state project” without acknowledging participation, even at times “initiative,” from the subaltern below (Mamdani, 2002, p. 8). Third is a blind spot that concerns the geography of the genocide—arguments that claim that because the genocide took place within the borders of Rwanda, the genocide was an outcome of “processes” that exclusively unfolded within those boundaries (p. 8).

This third narrative is one that the legacy of the International Tribunal for Rwanda (ICTR) seems to support, as well as other ad hoc tribunals convened after conflicts and genocide: War criminals are very often mostly, if not all, from one geographic area, from one side, contained neatly within borders. Verdicts ignore geopolitical relationships and even outright arming, funding, and collaboration from several governments and regimes. The kind of reading of the genocide that Mamdani calls for here may problematize how we see the Rwanda genocide as an “incident” or a “moment.” An understanding of multiple and layered temporalities and geographies as an alternative to a teleological understanding of the genocide also moves the notion of a “critical incident” in journalism beyond the “event.” It moves beyond a single presidential shooting or plane crash; it involves killing before the plane crash, a massacre that takes place over several months in 1994, and a processes of remembering and retelling the story that continues today.

Like Mamdani, Des Forges (2004), known as one of the foremost experts on Rwanda before and after the genocide, seeks to expose blind spots by complicating the often accepted narrative of the Rwanda genocide as an incident propelled by
“ancient hatreds.” Her book “Leave None to Tell the Story”: Genocide in Rwanda describes the genocide not as an irrational tribal conflict but as a killing campaign organized by Hutu extremist members of the Rwanda government and perpetuated and executed by civilians. On this point, Des Forges argues in detail that nationalistic broadcasts on Radio Télévision Libre des Mille Collines (RTLM), or “radio machete,” as it was commonly known, were instrumental in inciting the genocide through a constructed narrative, with the Tutsi as perpetual villains. Additionally, Mamdani’s work on the political identity of the Tutsis co-opted by the state also cites RTLM as essential in recasting the Tutsi as a race, and subsequently, enemies of the state that audiences could “identify.”

On the ground: State-sponsored propaganda and the media during the Rwanda genocide

RTLM was a nominally private radio station but had connections to very high-level members of the regime and other state-sponsored hate media by mid-1993 (Kirschke, 1996). For the journalists involved, the goal was to have an “independent radio station,” completely devoted to a “Hutu power” agenda, as a response to opposition parties pushing reforms and increasingly demanding access to and permeating air time on the nationalized Radio Rwanda. Kangura, a magazine dedicated to Hutu power and hate speech, published a report promoting the RTLM in 1991, a few weeks before it launched (Kirschke, 1996). For years before the genocide, Kangura (a Kinyarwanda word meaning “wake them up,” or “wake others up”) published and distributed issues in both Kinyarwanda and French with content and propaganda materials that urged readers to facilitate the destruction of members of the Tutsi minority group and their sympathizers (Totten & Bartrop, 2008).

While much literature has focused on state-sponsored hate media before and during the Rwanda genocide, less attention has been paid to other forms of journalism that existed at the same time, as well as frameworks of agency, urgency, a sense of journalistic responsibility, and resistance espoused by independent and non-state-sponsored journalists. As journalists from RTLM, Kangura, and other media outlets mobilized audiences through hate speech in the early 1990s, there were at least 41 documented cases between 1992 and 1993 of other journalists accused of “working with the Tutsi-majority Rwandan Patriotic Front”; “threatening state security”; “consciously or unconsciously playing the enemy’s game”; “treason”; “disinformation”; and being arrested, harassed, beaten, and/or arbitrarily detained for months on end then released by government authorities (Kirschke, 1996, p. 28).

By 1993, according to reports obtained by the Committee to Protect Journalists (CPJ), attacks against journalists had shifted from various intimidation tactics to mostly physical attacks and murders instead of arrests and imprisonments (Kirschke, 1996). Cases include the following three incidences: the death of television producer Callixte Kalisa in April 1993 from a gunshot near his home, the attack on
editor Ignace Ruhatana in May 1993 by an “unidentified” group, and the harassment of BBC stringer Ally Yusuf Mugenzi by the Interahamwe (a Hutu paramilitary organization) because of a story he had written (Kirschke, 1996).

As the genocide was in full force in April 1994, RTLM played hate messages even more urgently, more frequently, and with details of whom to kill and when to kill them by reading out lists of names during its programming. According to Metzl (1997), nowhere else in post-Cold War conflict zones (not even Bosnia) was the radio used as dangerously and insidiously as in Rwanda. At the time of the genocide, BBC reporter Ally Mugenzi found himself targeted over the soundwaves by the RTLM and later told the BBC in 2003: “RTLM acted as if it was giving instructions to the killers. It was giving directions on air as to where people were hiding” (quoted in Smith, 2003, para. 9). In the same 2003 BBC report, General Roméo Dallaire, commander of the UN peacekeeping operation during the genocide, stated: “Simply jamming [the] broadcasts and replacing them with messages of peace and reconciliation would have had a significant impact on the course of events” (para. 12).

After Habyarimana’s plane was shot down, interim Prime Minister Jean Kavannda’s voice was heard on the station: “If you do not want to have Rwandans exterminated … stand up, take action … without worrying about international opinion” (Metzl, 1997, p. 632). The “Rwandans” he spoke of were the Hutu majority, in line with the hateful rhetoric that the Tutsi minority were impostors. Many who heard his call during the genocide did just that, as foreign press failed to react in mass, the international community lagged in its response, and those deemed “enemies of the state” perished.

While local hate media was “fueling the killing,” international media “virtually ignored or misunderstood what was happening” (Dallaire, 2007, p. 12). Other regions were deemed more newsworthy at the time, and, according to Dallaire, major news agencies devoted few resources to Africa to begin with, let alone a small country like Rwanda, which was seen as having little strategic impact or value to the US geopolitical agenda. As the killings went on, Yugoslavia seemed to be the priority for war-zone and genocide reporting and the American public were deeply invested in the O.J. Simpson and Tonya Harding stories, while farther down the continent, the world had its attention fixed on Nelson Mandela and the fall of South African apartheid.

General Dallaire, who found himself without much support as he commanded the United Nations Assistance Mission for Rwanda (UNAMIR), observes that before the genocide, the local and international media mostly intersected through stringers: part-time news correspondents. Most media were local, with international publications and stations hiring locally based stringers to report back to international journalists waiting in Nairobi, Kenya. In essence, according to Dallaire (2007), “the international press were neophytes when it came to Rwanda,” and it was no surprise that one international media organization unknowingly used a stringer who was part of the extremist movement to report on events on the ground (p. 14).
The lack of independent journalists on the ground (because foreign and local journalists were being targeted, silenced, and driven into hiding for their lives) meant that there were no skilled, authoritative eyewitnesses available to banish the silence. As Zelizer (2017) states on the crucial role of eye witnessing in journalistic practice, “ever since journalists were first expected to provide an account of events beyond the experience of ordinary citizens, they have relied on eye witnessing to underscore, establish, and maintain their reportorial authority” (p. 39). She also notes: “eye witnessing offers journalists a way to reference their work and create consensus on which kinds of practice are appropriate and preferred” (p. 41). As the absence of independent journalists, eye witnesses, prevailed, Kangura and RTLM flourished unopposed.

When news of mass slaughter finally gained traction, Dallaire recalls the deluge of foreign journalists into Kigali, who would report for a few days, then leave and send others. His initial optimism, that the story would finally “matter” enough to propel a stop to the killings and inspire swift action by the international community, waned as he realized that few of the journalists knew much about Rwanda, and the ones who did seemed to be getting little impact after telling their stories: “a tree was falling in the forest and no one was there to hear it” (Dallaire, 2007, p. 12).

Covering the bodies: Journalistic standards and conceptualizing “social responsibility” in a post-genocide Rwanda

The silence was finally addressed in hindsight after the genocide, by both the UN and journalists. Shortly after the genocide, the intersection between international law and journalistic practice was highlighted by the ICTR’s “media case” (Prosecutor v. Nahimana, Barayagwiza, and Ngeze), which convicted three Rwandan journalists of incitement to genocide and has also been lauded as a success by the international tribunal and the international justice system at large. The media case has been cited as one of the ICTR’s most important contributions to international law (MacKinnon, 2004). Between Julius Streicher’s conviction and hanging at Nuremburg in 1946 and the ICTR that was set up in 1994, international tribunals had found little success holding journalists accountable for inciting genocide and other crimes against humanity.

Beyond the courtroom, various reporters wrote accounts looking back at their silence with shame. Bartholomäus Grill, then a reporter for the German weekly newspaper Die Zeit, later wrote in an article for Der Spiegel that he had penned “unforgivable stories from afar,” including “tales of the gruesome tribal war” and a statement that “foreign intervention was probably pointless” (Grill, 2014, paras. 43–44). He also quoted a British colleague commenting, “Oh, it’s just the Tutsi and the Hutu smashing each other’s heads in … It’s never-ending tribal warfare” (Grill, 2014, para. 5). Others, like Philip Gourevitch, tried to uncover the past through investigative reporting after the killings, by addressing who was missing and who had looked away, with brutal honesty. In a piece for The New Yorker in
1995, three years before his acclaimed book, *We Wish to Inform You That Tomorrow We Will Be Killed with Our Families* (1998), Gourevitch wrote:

Yes, there were grenade-flattened buildings, shot-up façades, and mortar pitted roads, and I knew that the retreating Hutu Army and militias had left the country pillaged: a virtually empty treasury; the tea-curing factories and coffee-depulping machines – Rwanda’s source of foreign exchange – destroyed; electrical and telephone lines slashed; water systems sabotaged and often clogged with bodies. But these were the ravages of war, not of genocide, and by the time I arrived in Rwanda most essential services had been restored and most of the dead buried. Fifteen months before, Rwanda had been the most densely populated country in Africa. Now the work of the killers looked just as they must have wanted it to look when they were done: invisible. From time to time, mass graves were discovered and excavated, and the remains were transferred to new, properly consecrate mass graves. But even the occasionally exposed bones, the conspicuous number of amputees and people with deforming scars, and the superabundance of packed orphanages could not be taken as evidence that what had happened to Rwanda was an attempt to exterminate a people. There were only people’s stories.

(*Gourevitch, 1995, paras. 23–24*)

Many international journalists failed to reflect on the duties and norms they had seemingly reneged on, particularly aspirations and standards of the “social responsibility of the press” as journalists. However, some international journalists reflected on the implications of their silence at various points of the genocide. On his own experience covering Rwanda early on as Africa Editor for *The Independent* in January 1994, the silence of the British press, and the lack of knowledge and context on the ground, Richard Dowden wrote:

I thought long and hard about writing a story that said: “Genocide Looms in Rwanda.” It might have made the front page—the aspiration of every journalist—but I had only one source. Everyone else I had spoken to talked up the Arusha peace process. I did not sense anything sinister on the streets of Kigali that might have made me skeptical. And, as the world-weary diplomats said, the worst that would happen if the accord did not work would be another round of fighting. I had not been in Kigali long enough to make a judgement or doubt my interlocutors, so to write a sensational story about impending genocide would have been dishonest and irresponsible. It might even prompt genocide. I put down my pen and went off to eastern Congo.

(*Dowden, 2004, p. 284*)

Echoing Dallaire’s sentiments on why coverage on Rwanda was sparse, Dowden added:
First of all, Rwanda simply was not important enough. To British editors it was a small country far away in a continent that rarely hit the headlines. The words Hutu and Tutsi sounded funny, hardly names that an ambitious news editor or desk officer would want to draw to the attention of a busy boss and claim that they were of immediate and vital importance. Within a few days of the plane crash, The Times ran several articles about what it obviously considered an angle of interest to its readers: the fate of the Rwandan gorillas.

(p. 286)

The social responsibility theory of the press was based on the standards in the Commission on Freedom of the Press in the United States in 1947, as well as the book Four Theories of the Press by Siebert, Peterson, and Schramm (1956). The theory calls for an independent press free from censorship and holds the press responsible for producing content that serves the public through facts and analysis: “in the form of social responsibility theory, the role of the press as a kind of a public sphere” (Rantanen, 2017, p. 3465). As highlighted by Dowden, the press, specifically the international press, could have served its audiences better by framing the story in a way that reflected the urgency of the human killings taking place. As Callison and Young (2020) argue in their book Reckoning: Journalism’s Limits and Possibilities, “reckoning” with journalism as a practice must center confronting power relations, including “stereotypical frames and narratives that erase histories of colonial violence” (p. 29). In the case of coverage (or lack thereof) of the Rwanda genocide by international journalists, reckoning with what happened in 1994 would also require re-evaluating what the profession deems a worthy public or audience and whose bodies are of vital importance.

The mistakes made during the Rwanda genocide also raise questions about whether this theory is sufficient and when, as well as whether the criticisms aimed at it since Four Theories of the Press was published are valid in this context. The social responsibility of the press theory has been called “vague” and vulnerable to justifications and nefarious arguments by “authoritarians of various stripes” toward controlling the press (Merrill, 2002, p. 134). It has been deemed “hegemonic” and overly westernized in its assumption of autonomy of the press from the state (Nerone, 2012, p. 466). There are doubts about how the theory may be applied, unapplied, or tweaked considering the particular groups of journalists and their contexts and whether there is a need for an entirely new paradigm that addresses the silences from reporting on the Rwanda genocide.

Possible and more specific alternate paradigms in a post-genocide Rwanda include “peace journalism,” “solutions journalism,” and “restorative narrative” models under the “constructive journalism” umbrella that “emphasize a journalist’s dedication to the public good” (McIntyre & Sobel, 2019, p. 2131). On Rwanda, McIntyre and Sobel state that proponents of the restorative narrative style of reporting “lament that traditional news stories are often ‘confined’ to the facts of a tragedy and should be broadened to include stories of recovery and resilience,”
with the impetus behind the model a response to journalist tendencies to “parachute in and cover a tragedy before quickly moving on to another story” (p. 2132).

There are also questions surrounding what the international community of journalists has truly “learned” from the Rwanda genocide as a critical moment to change the hows and whys of their practice. Today’s international community may “understand better that information and disinformation merge in times of conflict, and that confusion, often spread deliberately, is the inevitable outcome” (Pottier, 2004, p. 1). However, there is no escape from the technology, geographies, complexities, nuances, and conflicting narratives that come with each conflict or genocide and further blur the line between information and disinformation. In the case of a post-genocide Rwanda in the late 1990s, and conflict in neighboring Democratic Republic of the Congo, international journalists ran the risk of media manipulation by the new regime, as the “guilt accrued from failure to cover the genocide, mixed with considerable psychological pressures exerted on visitors to Rwanda after the genocide, had lessened the appetite for scrutiny” (Pottier, 2004, p. 81).

Rwanda has undergone a rapid economic and social transformation, but there is less of a spotlight on the disturbing media landscape and policies in the country. Vast data on censorship in Rwanda may be difficult to acquire; however, a recent study, including in-depth interviews with journalists and editors (from commercial, government-sponsored, student-run, or religious media organizations) found that the complex relationship between journalists and the government included a great deal of self-censorship to promote “peace and reunification,” strong restrictions of press freedoms, and lack of understanding of the complexities in Rwanda from outside reporters (Sobel & McIntire, 2019, p. 558). The memory of the genocide and the media-oppressive environment preceding it does not seem to have entirely revolutionized media policy on the ground today.

**Conclusion: Retelling the story—The politics of collective memory and propaganda**

While initiatives by survivors often guide how the public commemorates the genocide, public memorializations of the genocide also often are state-sanctioned and state-controlled. While civil society groups like *Ibuka* (“remember”) freely connect genocide survivors across the nation and the world, and while survivors have made “substantial and distinctive contributions” to memorialization in Rwanda, the state-led endeavors also use public remembrance as a way for “national elites to cultivate a shared understanding of the past and to construct political legitimacy” (Ibreck, 2010, p. 330). Government officials appropriate post-genocide public memorials to tell the story about who can be remembered and how. Officials call out their political critics, demand public participation, and sidestep any mention of RPF “vengeance killings” or the deaths of many Hutus during the genocide at these events (Ibreck, 2010, p. 331).

While the media landscape in Rwanda now includes more media houses, unwavering technical and financial support from international donors and agencies
like UNESCO, and a School of Journalism and Communication at the University of Rwanda (founded shortly after the genocide in 1995), some scholars argue that the RPF has promoted private media outlets to create an ongoing “façade of media pluralism” (Waldorf, 2007, p. 404). This is supported by the fact that while the Rwandan constitution recognizes and guarantees “freedom of the press and freedom of information,” a law prohibiting “a crime committed by any oral or written expression or any act of division” is “widely” applied to restrict and censor journalists from speaking about or publishing “anything regarding the relationship between Hutus and Tutsis” (quoted in Sobel & McIntyre, 2019, p. 561).

This presents an obstacle for journalists in the country seeking to act as a narrative voice in commemoration ceremonies, or as critics of government actors protecting a “national memory” that may be misleading or inaccurate. It creates difficulties for journalists in Rwanda who may be seeking to strengthen a voice away from and outside the state, in similar ways that journalists in the United States and other political contexts after a critical incident may be able to use commemorative events to establish “independent, long standing records” that increasingly incorporate journalists as narrators of their own stories and profession (Zelizer, 2017, p. 152). The Rwanda case complicates normative assumptions of the “critical incident” as an event or discursive opportunity that necessarily reinforces journalists’ authority as an interpretive community, or leads them to reflect and strengthen journalistic norms and values and acceptable professional practices. As post-genocide Rwanda continues to go through a period of transition economically and developmentally, as journalists elsewhere also face challenges to “norms” of the profession, and as journalists everywhere reassess their roles, this time is a critical opportunity for scholars to further analyze models of the journalistic profession often taken for granted.

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2.7

FALSE ACCUSATIONS IN A SCHOOL

A critical incident in Brazilian journalism 25 years later

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On March 28, 1994, two mothers accused the owners of an elementary school in a neighborhood in São Paulo, along with six other school workers, of sexually abusing their children. The children told their mothers they were taken to another student’s house, where they watched pornography and were sexually abused. During the investigation, police found that the house described by the children was not the same as the house of the school owners. The school was also searched, and nothing was found. The mothers then reported the case to the media. The press reported the event, but the couple who owned the school were not heard by the Brazilian media. Instead, sensational reports circulated, with headlines screaming: “Kombi was the motel in the sex school” (*Notícias Populares*); “School van carried children for orgy” (*Folha de S. Paulo*); “A school of horrors” (*Veja*); and “Motel in school of sex” (*Globo*). Some of the articles published made statements that a later police investigation found to be false. The children’s identities were also revealed.

The logic of the scoop drove the coverage. On Brazilian television, *Globo TV* is the audience leader, and other broadcasters began to explore the case to try to compete. The three leading legacy newspapers—*Folha de S. Paulo*, *O Estado de S. Paulo*, and *O Globo*—followed one another in the journalistic coverage. *Diário Popular*, a popular newspaper, was an exception. Reporter Antonio Carlos Silveira dos Santos noted contradictions in the case, and the paper chose not to publish anything until there was evidence against the accused.

The public was angry at the school owners, who suffered from harassment from the authorities. The school was looted and closed. The school owners were also arrested. The case, however, was eventually dismissed for lack of evidence on June 22, 1994. The accused people got very sick, lost ties with family and friends, and accumulated debts. Some of them died. In 2003, the school owners filed a lawsuit against media companies, accusing them of “moral lynching.” The Brazilian court found the press guilty of omission and neglect in the case. The mainstream
media—eight news outlets—were condemned for moral damages. *Globo TV* paid about $300,000.

The case became a primary example of ethical problems in Brazilian journalism, mainly because legacy journalism outlets spread fake news and disinformation. Twenty-five years later, the incident remains the most studied journalism incident in Brazil—a classic example to journalism students of what never to do—and its repercussions can still be felt, as news organizations seek to fight misinformation by relying on public trust that had been broken. This chapter analyzes how this incident has affected journalism in Brazil, showing how journalists have responded to the incident and what lessons they have learned. For this case study, we analyzed journalistic texts about the Escola Base case in newspapers and websites since 1994 and two books (Coutinho, 2016; Ribeiro, 2000) about the incident.

**A critical incident in journalism?**

According to Zelizer (1992), “critical incidents of different kinds illuminate different rules and conventions about journalism practice and authority,” allowing journalists to negotiate the boundaries of journalistic work (p. 67). The Escola Base case revealed how ethical breaches impact journalistic credibility and the limitations in how they deal with daily coverage.

The emphasis on speed in how mainstream media break the news is central to this case for two reasons: the rush for the scoop and the “media war” with other companies. The 1990s were a milestone decade in the press, especially as the television industry in Brazil engaged in commercial disputes involving media enterprises. This became a battle for the audience, and one effect was the emergence of newspapers with sensational language and a lack of ethics. As a result, there was not a proper investigation of all the people involved in the Escola Base case. Journalists did not interview the school owners, but they reported about the owners as if they had already been found guilty of the crime.

The condemnations of “sensationalism” provoked journalists and the mainstream media to review their methods. The Escola Base case acted as a “memory” for later cases, as a warning when journalists did not adequately investigate the facts. The case is remembered in newsrooms, classrooms, and even in other contexts, such as the political arena. For example, to suggest that the press was rushing to condemn him for corruption before his judgment, former President Luiz Inácio Lula da Silva said in 2018: “We are on the way to another Escola Base case” (Lima, 2018).

However, revised methods were not institutionalized, and sensationalism in Brazilian journalism continues today. The “must-be” of journalistic practice is not always equivalent to the materiality of journalistic activity. Therefore, there are no discourses by journalists discussing how they improved their reporting. Media outlets, such as *Folha de S. Paulo*, said that journalists, in general, needed to improve their practices but without a true self-analysis. In his book about the incident, Coutinho (2017) said: “Brazilian journalism learned from Escola Base but continues to make mistakes.”
The incident also affected the credibility of journalism and its ability to inform and communicate with citizens about everyday life. Many news organizations, including Globo TV, paid millions in indemnities to the victims of the case and had to retract their mistakes publicly. These mistakes have affected the credibility of news organizations. Mick (2017), for instance, conducted a survey on the credibility of news organizations and journalists in the 2010s in Brazil, concluding that Brazilians believe in journalists more than in news organizations. The alleged reasons for the higher professional than institutional trust are the influence of media owners and advertisers and perceived biases in operations.

This case forced members of the Brazilian journalistic community to rethink their roles, identities, and boundaries of acceptable professional practice. We can list the following dilemmas involved in the case: (a) the blurring of boundaries between the journalistic and legal fields; (b) the accuracy of the information versus the speed and competition between news organizations; and (c) Brazilian public opinion cancelling the lives of several people (long before the term “cancel culture” was coined). The school owners were called pedophiles, and even after being cleared by the courts of the accusations, they never regained their normal lives.

The journalistic community debated the case in press observatories, forums, conferences, and books. We found approximately 40 journalistic articles citing the incident and selected: (a) the most relevant texts from the year 1994; (b) texts on events from other years that discussed the incident; and (c) two books (Coutinho, 2016; Ribeiro, 2000) about the incident. The focus of the analysis is to understand what journalists say about journalism practices based on the incident. Zelizer (2017) emphasizes the role of discourse in the construction of memory and meanings about critical incidents in journalism. She notes that discourses on “critical incidents offer a way to address concerns at issue for the journalistic community through collective memory, and professional consciousness emerges at least in part around ruptures where the borders of appropriate practice need renegotiation” (pp. 180–181).

**Discourses on the Escola Base case**

Discourse organizes memory about critical incidents in journalism. However, silence also produces meanings. The school owners never spoke to the journalists after the case, suspicious that they represented the journalistic institution itself. The owners passed away (she died in 2007 and he in 2014) without producing discourses for the press.

The case became a reference for journalists’ reflections on their professional practices. In 1994, Eugenio Bucci (1994) published a text in *Estado de S. Paulo*, one of the leading Brazilian newspapers, called “Press promoted a holy war.” He said that television and newspapers are directly responsible for the damage. Bucci said the media mobilized viewers for “moral lynching” and launched a holy war against “depraved” people.

When the police published the inquiry, some TV stations lamented the poor coverage of the story. However, Bucci (1994) stated: “It’s too late. The violence is finished. Not against the students but the accused.” The newspaper *O Estado de S.*
Paulo published another article, “Murder by the media,” by Carlos Alberto di Franco (1994): “Even if the press made a formidable effort to repair (the damage), the reputation of the protagonists has already been irreparably shaken.”

The magazine Imprensa (Press), which focuses on the journalistic field, published in September 1994 the article “Anatomy of a crime of the press.” (Souza, 1994) The report states that it was the press, not the judiciary, that condemned the innocent teachers in the Escola Base case.

In December 1994, Folha de S. Paulo, another mainstream Brazilian newspaper, organized a conference to discuss journalistic errors in the Escola Base case. According to the event organizer, the Folha de S. Paulo newspaper, the media contributed to the “moral lynching” of the people involved in the coverage. Nevertheless, there was no self-criticism from the newspaper, which claims to have been “true to the facts.” However, the facts are not as “transparent” as the newspaper claims, as the school owners and police disputed them.

In 1999, five years after the case, Observatório da Imprensa (Observatory of the Press), a Brazilian initiative dedicated to discussing journalism, published texts about the Escola Base case. Francisco Karam (1999) explained how television programs, not necessarily journalistic, increased the audience size for the case through sensationalism. These shows were produced by news organizations and presented themselves as “police journalism.” The shows consistently showed the faces of the school’s owners who were accused, calling them pedophiles and monsters. TV reporters were outraged by the incident and called for the school’s owners to be arrested as soon as possible.

From the analysis of journalists’ texts on the case, we conclude that currently, most journalists assume that the press was wrong. However, at the time of the incident, journalists and media organizations neglected ethical and professional norms and standards. And the compensation paid by the news organizations showed that there was also legal negligence. Despite the payment of the indemnities, there was no reflection on the journalistic responsibilities in the case, and there was no institutionalization of new rules to avoid future coverage such as that in the Escola Base incident.

Twenty years later, journalists began to recognize the repercussions of the case. Folha de S. Paulo, one of the accused and convicted newspapers, organized another seminar on the case. The event aimed to discuss how newspapers covered the case and how it changed investigative journalism in Brazil. According to Suzana Singer, a newspaper ombudsman who worked as a journalist in 1994, journalists are now more concerned with preserving the identity of children covered in the news. Fact-checking of speeches of authorities—politicians and police, for example—has also increased. In Brazil, fact-checking initiatives partner with mainstream news organizations or are part of these companies. However, journalists at the event also pointed out that the improved reporting mechanisms did not exempt the press from errors.

In 2016, journalist Emílio Coutinho published a book on the Escola Base case. He interviewed almost everyone involved in the case who was still alive. According to Coutinho (2016), “after two decades, there is still fear, insecurity, and
distrust. Despite talking to me, the neighbors did not open the door of their homes. It is like a prohibited topic” (p. 29). According to one of the school’s owners, Paula Milhin, even if she had been convicted, the press did not have the right to publish her home address. Another accused in the case said: “This all happened because of a lie, unchecked information that people believed. [It was] life-threatenmg. We went out on the street, and people wanted to kill us” (Coutinho, 2016, p. 78).

**Lessons not learned**

From 1994—when the alleged sexual abuse of children in São Paulo shocked the country—to 2019, Brazil faced intense social and political processes that also challenged journalistic practices. In 2013, with the “June Journeys,” millions of people went to the streets calling for social rights and a more accurate representation of their demands. At the beginning of the protests, they were just members of student movements: They wanted a fairer bus ticket for everyone in São Paulo City and a free ticket for students. Soon the protests spread to other important Brazilian cities (in a week, at least a million people were on the streets), and the protest turned against traditional Brazilian institutions, including journalism. The crisis may have been triggered by phenomena such as the Escola Base case and the problematic journalistic practices around it, including quickly produced news without sufficient investigation and an excessive reliance on official sources.

Since that case, Brazilian people have begun viewing journalism more critically, and June 2013 can be considered an “explosion” of this criticism. “It’s obvious that the mobilization, strength, and speed are based on [social networks]. That’s where many people learn about [the protests] and couldn’t care less about what we say. This effect has to be discussed,” said one of the chief editors of *Folha de S. Paulo*, the leading Brazilian reference newspaper, referring to the June 2013 protests (Oliveira, 2018, p. 16).

Reflecting on what Brazilian journalism has learned—or failed to learn, in the case of Escola Base—is vital. Brazilian journalists have historically been more concerned with the speed of the news than with its quality, mainly because of competition for first-hand news. According to Quéré (2005), an event has an intrinsic power to reveal problematic fields associated with it—cause-and-effect relationships that only the event itself may trigger. We could suppose that Escola Base was an exemplary case of this process, revealing the deficiencies of Brazilian journalism. Sodré (2009) calls this “eventness.” This concept is linked to a relational complex between materialities, a symbolic dimension, and the individual affections of those who experience the event—in this case, an event poorly understood by journalists. The requirements of fast interpretation led journalists to work according to a less critical routine, especially because of a predominantly sensationalist characteristic of journalism on TV in the 1990s in Brazil and—it is important to say again—the competition for first-hand news. This process results in a symbolic dimension inside the story, part of “eventness,” which relies more on reports from authorities than
on facts from the material dimension. This is significant in that it occurred in the 1990s, before the misinformation era (Wardle, 2018), which is the result of the acceleration of this process, among other factors.

In response to the Escola Base case, the first action taken by the mainstream journalism industry was to reiterate the importance of verification processes and the problems arising from a dependence on official sources. These are basic journalism principles relatively neglected by the newsrooms in the complex ecosystem of media companies, the political establishment, and civil society. It is also essential to remember that at that time, before digital social networks became prominent, civil society was the less powerful part of the communication architecture of the Brazilian public sphere.

Despite the widespread condemnation of the media’s shortcomings on this specific case, the academic field devoted little attention to the Escola Base incident. A brief search for the term “Escola Base” in the Brazilian catalog of theses and dissertations resulted in only two master’s theses focusing on the case, both from legal domains, not from the communication field. While there have been some efforts in journalism and communication studies to examine this case, these focused on journalistic practices. In journalism schools, the case became a prominent example of failed verification and error induced by a complete reliance on official sources. The Escola Base case, however, carries deeper implications.

The rise of fake news

During the 2013 June Journeys, the chief editor of Folha de S. Paulo defended the importance of discussing “this effect” of the Escola Base incident on journalism in Brazil (Oliveira, 2018). This effect continues to linger, and the lessons not learned continue to haunt the news media in the country, now facing challenges from the rise of fake news and other forms of misinformation.

By establishing itself as a mediator between society and events emerging from reality, journalism has adopted standardized narrative techniques and deontological principles to understand meanings in the semiosphere (Lotman, 1996). However, in the face of the crisis, journalism is questioned, if not refuted, by the protagonists of the event themselves. Its representation of the event in the news, in the transient condition of an interpreter, leaves “leftovers” (Santaella, 2008): facts or reports that are not part of the news. Still, they circle on the digital social network. “Leftovers” made by non-journalists now comprise interpretations outside the journalistic field in the “digitized semiosphere” and affect large groups of people by appearing on their social network profiles.

This process did not take place at the time of the Escola Base case, as there was no digital social network as we know it today. But the event could historically be considered part of the beginning of a more influential movement of public questioning against traditional journalism and its routine of producing news in Brazil from its “leftovers” after a long dictatorial government (1964–1985). The question that still echoes from the Escola Base case, especially at a time when Brazil, like
many other countries, is plagued by the proliferation of falsehoods, is: How can journalists defend their authority for a faithful representation of reality?

The Escola Base case teaches Brazilian journalists that reports from authorities are insufficient. Sources always have a vested interest in the narrative. In this case, the police needed to respond fast to the Brazilian public sphere about who was guilty of the alleged horrible crime. Journalists know that they should be critical of the first information emerging from complex cases like the Escola Base case, even if this approach makes the news-release process slower. But when media executives and, consequently, the journalists that work for them succumb to the pressures of the market, they might not have the time nor motivation to reflect on every single editorial decision they make.

Some 25 years after the incident, the Escola Base case has not been sufficiently discussed in this epistemological context. It was a critical incident that brought together different interpretive communities—journalists, politicians, and the public—to reflect on the shortcomings and excesses of the news media in Brazil, and while it produced discourses that articulate some critical lessons learned from the unfortunate case, many journalists in Brazil still chase scoops and prioritize speed over accuracy. The Escola Base case continues to haunt the news media, especially at a time when fake news threatens journalism: an example of how a critical incident can have lasting effects, not because journalists remembered the lessons they learned but because the public did.

References


SECTION III

Communities Engaging in Interpretation
3.1 CRITICAL INCIDENTS AND AUTO-ANALYSIS

Photojournalists’ introspections while covering the drug war in the Philippines

Ma. Diosa Labiste

Journalists in the Philippines were among the direct witnesses in a “drug war” waged by President Rodrigo Duterte. They were also bystanders in the continuing dispute over its grim statistics. The government claimed it is behind some 5,500 deaths and some 200,000 arrests as of December 2019 (or halfway into Duterte’s six-year term), a figure disputed by human rights groups and academics monitoring the drug campaign. Human Rights Watch (2019) claimed there had been 200,000 lives lost, while a study presented in a forum by the three top universities in the country noted that 7,000 had died as of April 2019 (Ateneo de Manila University School of Government, 2019). The work produced by journalists and photojournalists on the drug campaign was recognized by their peers and has been analyzed by scholars. However, there has been little, if any, examination on how their work led to a rethinking of journalism, particularly on how they offered opinion independent of the “facts” that emerged from their stories and photographs. Thus, as equally valuable as reports and photographs on the killings are the first-hand accounts on how they reported on the issue. These reflective accounts have found their way into various local and international news and award-giving organizations.

The paradox of anchoring the concern for facts in feelings was conveyed by a photographer, Basilio Sepe: “I am seeing my countrymen die” (Katz, 2017). Sepe is one of the 12 photographers featured in a Time magazine article that asked local and international freelancers and stringers to share their thoughts, along with their iconic photos of the drug-related killings, as they were “keeping a human toll in the public eye” (Katz, 2017, para. 3). After being exposed to numerous arrests and killings of suspected drug users and sellers, and the deliberate display of impunity of state forces, some reporters and photojournalists have spoken out against the drug campaign.

The scale of President Duterte’s violent drug campaign has induced more than obligatory news reporting. Allowed by the police to accompany the drug
operations, journalists saw the point-blank shooting of suspects and the shock and grief of the victims’ families. The police operations may have offered the media a serial spectacle of drug suspects’ deaths. But the drug-related killings have also led some reporters to re-examine their role as witnesses to the violence by raising questions on the limits of their profession and, possibly channeling the moral outrage of their subjects, by deploring the lack of a public outcry.

Partly in response to the drug-related deaths, and partly in response to the constraints of the norms of impartiality and deference to official news sources, journalists developed their own notions of interpreting an event. This they did in the course of reporting on the killings of drug suspects. They faced the tension between journalism’s persistent norms and their personal desire for truthful presentation of the drug campaign. It is within this tension that retrospection emerged, challenging some norms of journalism, among them detachment and neutrality.

Retrospection is close to what Jacques Derrida termed auto-analysis. Auto-analysis names an act in which one writes about what takes place but also recounts a personal story (Derrida, 2018). “Auto” is Greek for “self” and “same.” Thus, auto-analysis is that which “says the same thing twice,” in the manner that the narrative anticipates an introspection or hearing one’s own voice (Lawlor, 2015, p. 130).

Auto-analysis and critical incidents

Auto-analysis enters journalism practice as a form of metajournalistic discourse (Carlson, 2017) in a discourse community unified by a communicative agenda (Jones, 2016). Metadiscourses stand outside the narrative as a critique and consider the counterpoints and aporias. However, Derrida’s notion of auto-analysis, which is similar to his other concept of auto-affection, does more than differentiate certain views and clarify previous points. Auto-analysis, in deconstruction, intends to bring the pragmatic side of the narrative to light and then jolting it by introspection done openly. It renders a judgment that could undermine the interpretation of the text and its production.

Auto-analysis is revealed as a deliberate act of self-reflection, such as when journalists evaluate an event or issue through some explicit insights or implicit assumptions about their work. Auto-analysis shows how deep thinking is embedded in acts of journalism, driving changes in ethics and news production. Auto-analysis is irreducible to routine evaluation in news gathering and gatekeeping. There is probably a bit of auto-analysis in news reporting, but it is not a concern here because the focus of this chapter is to explore the relationship between auto-analysis and “critical incident” in journalism. A “critical incident” is a moment in which journalists articulate, challenge, and negotiate the boundaries of their practice (Zelizer, 2017). Critical incidents may be inscribed and expressed on media texts as discourse on professional and institutional practice. As an elevation of professional concerns, critical incidents allow journalists to rethink institutional tenets and norms of journalism.
This chapter holds that journalists’ exposure to a critical incident, like Duterte’s violent anti-drug campaign, is a moment in which extraordinary circumstances cut journalists off from the ordinariness to which they are accustomed. A critical incident can be thought of as an entirely unexpected and incalculable point in time that poststructuralists have termed an “event.” Everyday events take place, are announced, and are anticipated. However, what makes an “event” distinct is its uncertainty. An event is an occasion that perplexes because it has neither a cause-and-effect explanation nor a fixed origin (Derrida, 1978). The bewilderment forces one to render judgment upon an event, without a precedent and a guarantee of clear judgment. How then does an event induce shift in journalism? An event may catch journalists by surprise, but it also forces them to make a decision on the weight of their moral and political responsibility. Journalists, as presumed here, are capable of realizing this double process.

Duterte’s so-called “drug war” is an example of a critical incident. Journalists, just like lawyers, human rights defenders, and families of the victims, have worked out the consequences of the anti-drug campaign that forced them to deal with situations, whether arrests, shootings, or deaths. To demonstrate how auto-analysis is bound up with critical incident, I examined nine juried award-winning works of journalists in the Philippines on Duterte’s campaign on drugs from 2016 to 2019 (see Table 3.1.1). Some of the works received international recognition, including a Pulitzer. A few of them won multiple awards given by local award-giving bodies. The awarded works include digital/multimedia stories, feature articles, and photo essays, and represented a mix of individually authored and collaborative works. The sites of publication are also varied as they include international news organizations, Philippines-based media groups, and a community press. Five awardees are women who are either photographers or investigative journalists.

The award-winning works and the post-awards interviews, reflections, and writings of journalists evinced auto-analysis. The post-awards analyses often return to awarded works, dwelling on their significance for the authors as well as their perceived value for the larger public. Auto-analysis that is constitutive of critical incident transforms journalism, despite the disruptions of established norms and guidelines. Far from being undermined, journalism is invigorated.

**Critical incidents and auto-analysis**

**Confronting journalism’s limitations**

An examination of journalistic practice today demands more theoretical resources other than the modernist tradition of journalism that favors the positivist way of ferreting out “facts” in an event. This signals a turn to postmodernism to deal with the crises of representing truth, reality, and authority in journalism. Journalism does not mirror reality but mediates it. Thus, faith in the integrity and sufficiency of facts is hollow because facts, even if subjected to relentless verification, can be twisted and manipulated. This would relegate serial verification (the search for more facts) to an infinite regress. Sticking fast to facts, as a principle in journalism, can render truth-telling insufficient because such a system may or may not satisfy all
TABLE 3.1.1 Nine juried award-winning works of journalists in the Philippines that portrayed Duterte’s campaign on drugs from 2016 to 2019

<table>
<thead>
<tr>
<th>Title and Year</th>
<th>Author</th>
<th>Organization</th>
<th>Description</th>
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<tbody>
<tr>
<td>2. In the Name of the Father (part of The Impunity Series) (2017)</td>
<td>Patricia Evangelista with Dominic Go and Paolo Villaluna</td>
<td>Rappler</td>
<td>A story on vigilante killing that won an award for excellence in feature writing in 2017 and also earned Evangelista an award for broadcast journalism for women.</td>
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<td>4. The Nightcrawlers (2019)</td>
<td>The National Geographic</td>
<td>The National Geographic</td>
<td>A documentary about a team of photojournalists reporting on drug-related killings. Screened at international film festivals, it was nominated for awards in documentary while its director, Francis Mora, won a prize for courageous filmmaking.</td>
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<tr>
<td>5. “I Am Seeing My Countrymen Die” (2017)</td>
<td>Andrew Katz</td>
<td>Time</td>
<td>A series of vignettes from 12 award-winning photographers that followed the government’s drug campaign. Each shared a photograph from their collection and their comments about it.</td>
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the requirements to it. Moreover, truth-telling in journalism can be criticized for the pretension of having complete, rather than partial and fragmented, knowledge and truth of society.

Objectivity, neutrality, and fairness may be regarded as “grand narratives” of journalism and the bedrock of “good” journalism but these bases are shifting. It is still possible to think of coherence and truth-telling without privileging those norms because they stand as self-evident generalities that were evoked and made to work in all situations. Journalists have to recognize that truth is underpinned by a particular power and knowledge and what better way to confront it than to contend the truth one possesses to prevent its repression. Foucault (1988) reminds us that truth-telling is a contingent discursive practice and its task is to “find both its own reason for being and the grounds for what it says” (p. 88). Following Foucault, one can say that journalism’s adherence to truth-telling must be constantly examined when encountering critical incidents.

Auto-analysis, or self-examination, could be expected from a critical incident because it initiates a move that undermines things that it affirms (Derrida, 1990). These could be norms, values and ethics in journalism that are often expected to give fixed standards of response. Zelizer (2017) holds that introspection is central to critical incidents, in which journalists “constitute themselves not only as objects of the accounts they give but also as subjects of other accounts that elaborate on their earlier reportage” (p. 181). However, the proposition should explain how transcoding takes place. How does one constantly assess conditions in terms of the truth content of a critical event? While the notion of critical incident incorporates self-reflection, it seems limited in its innovative potential. Conceptualizing the relations

<table>
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<tr>
<td>8. A photograph of a woman cradling a toddler with two caskets behind her (2018)</td>
<td>Eloisa Lopez</td>
<td>International Women’s Media Foundation</td>
<td>The photograph is part of the portfolio that won the Anja Niedringhaus Courage in Photojournalism Award in 2019.</td>
</tr>
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</table>
between journalists and the media institutions in that way would give rise to a question that is difficult to answer. One can only wonder what is being constrained, guided, and evaluated, and by whom.

In the next section, I will account for the concept of auto-analysis in relation to the concept of critical incident, through an examination of juried works of journalists and their reflection upon such works as concretizations of auto-analysis. The authors’ discussion of their exemplary outputs could reveal insights that could challenge journalistic convention and the nature of critical incident itself. At the same time, they could also designate models of engagement that potentially invigorate the practice of journalism.

**Auto-analysis in Duterte’s drug war**

In June of 2019, halfway through his six-year term and during his annual State of the Nation Address, President Duterte borrowed a line from Winston Churchill. “We are now entering a period of consequences,” he said, referring to the effects of his policies, including the so-called drug war, on the country. Duterte’s political clout, derived from his control over the legislature, judiciary, and military, enabled him to continue his anti-drug campaign of three years, despite criticisms from local and international human rights organizations. Among such appraisal of the consequences of Duterte’s governance, the Philippine Human Rights Information Center (2020) published a report, titled *Killing State*, that highlighted the sense of the phrase on several registers.

The drug killings qualify as critical incident. The nature of the killings, which are unprecedented but often carried with unrestricted presence by the media, led to significant introspection among the journalists that regularly followed the drug story as reporters and photojournalists. However, it is not enough that stories and photographs about the drug crackdown were routinely released to the public. For a disturbing encounter to become a critical incident, there must be a chain of actions initiated by journalists, to transform themselves and the situation they find themselves. This means that the awareness of the incident as a journalistic quandary is spoken about in terms of what counts as a proper thing to do as an individual and as a journalist.

It is in this manner that what the concept of auto-analysis offers to critical incident is not so much a question of how journalists can initiate actions due to the occurrence of an event, but how they emerged through such actions transformed. With auto-analysis, journalists are not limited to the recognition of the incident but also its consequences. Moreover, they make decisions that change them and their environment. I propose four methods of auto-analysis: inner-directed speech, a rebuke or condemnation, meta-commentary on journalism, and a public appeal. These modes of auto-analysis have crisscrossed public, institutional, and professional roles of journalists.

First, **auto-analysis as inner-directed speech that reflects on events and people**. The reflection provides the frames on how to interpret events. For example, this process of reflection underpins Eloisa Lopez’s thoughts during an interview:
I’ve recognized a different kind of courage from the families left behind. I see now that there is also a lot of courage in dealing with bereavement on top of poverty, impunity, and harassment in their own communities. There is courage in their resistance, in every protest they go to, in every speech and placard against the government that tolerates it. There is courage in sharing their stories to journalists like me, in speaking out when being silent is more convenient.

*(Johnson, 2019)*

Second, *auto-analysis can also take the form of a rebuke or admonition*. It is a judgment in response to people, ideas, and actions to evoke sympathy or make the audience feel a certain way. For example, Dondi Tawatao invited the audience to look closer and endorse his observation of the scene he composed in a photograph. Rather than just describing the people and the action, Tawatao spoke about how he structured the elements to convey the horror and powerlessness of the people in communities where the deaths took place:

The two women with fear and uncertainty in their eyes are emblematic of every crime scene we come across every day. The drug war has created a disconnect and fear in the communities and has actually made things the opposite: people are afraid of going out at night not because of petty crime and drugs, but because of the police and death squads roving the streets.

*(Katz, 2017, para. 49)*

Third, *auto-analysis can also be a form of meta-commentary on journalism*. These statements are about assessing actions of journalists in relation to their commitment to professional goals. They may intend to align their professional conduct with their own moral judgments. In other words, they want to reorient their work from the traditional role of simply disseminating information. For example, photojournalist Raffy Lerma spoke about the dilemma of staying neutral in his work as photojournalist. He provided a moral justification, which is a form of effectual partiality, for his empathy:

As a news photographer it was my job to document what was happening, but a part of me that heard Olayres’ pleas for help also died a little. It was raw and gut-wrenching, but I could do nothing but press the shutter button. “That’s enough! And help us!” she cried out to media workers, authorities and onlookers.

*(Katz, 2017, para. 11)*

Basilio Sepe’s words show how he reconciled his stance of detachment as a photographer with the decision to stay in touch with his feelings when he attended the funeral of a victim and witnessed the raw emotions of a grieving family member:
I didn’t realize I was crying while I was taking my shots. It came to a point that even I couldn’t take it anymore. I lowered the camera, went to a secluded place and cried. Before I left the cemetery, I saw Renato once more. He was calmer, more collected, but I still saw the grief in his eyes. I thanked him before I left and offered my prayers. All the while I was hoping, praying, that these events would stop. It was at this moment that I realized that, as a journalist, it is moments like these that I question my humanity and the reality around me. I cannot be unaffected.

(Katz, 2017, paras. 24–25)

Fourth, auto-analysis, as appeal, also positions society, and the events thereof, within the horizon of journalism’s vision. It is about how journalism responds to the challenge of telling the truth and holding institutions of power accountable. These two functions are essential in building community and strengthening the public sphere. For example, Rappler’s Patricia Evangelista tried to combine truth-telling with the cognizance of the community building, or specifically to make a fitting collective response to the killings:

The term is extra-judicial killing. In the weeks since Rodrigo Duterte became president, the usage of the phrase has become so pervasive, so ubiquitous, that it has become regular street parlance for drug-related murders. An extra-judicial killing is specific. It requires planning and intent. It is outside the bounds of self-defense and the terms of engagement required of any declared war. There are other words for this. Summary executions. Targeted killings. Congress chose to drop the term “to put things in proper perspective and correctly define the issue,” further citing a Wikipedia definition defining extrajudicial as politically motivated. The police now call them DUls – Deaths Under Investigation.

(Evangelista, 2017, paras. 40–41)

The above statements of journalists on the anti-drug campaign exemplified auto-analyses within the context of the killings of drug suspects and in the exercise of their role as journalists. By providing the social and political circumstances of the issue, the public is made aware of the extent to which the crackdown and deaths assaulted slums and urban poor communities. The common thread of the journalists’ statements is that the anti-drug campaign has come to stay, as noted by their mention or allusion to ubiquity, permanence, and the routine of killings, fear, and mourning. One of the journalists claimed that the killings are not random; rather they are part of a systematic enterprise that has resources and goals. As a state policy, the drive against drugs can be seen as prolonged repression of the poor.

When considering public discourse, as auto-analysis, in relation to critical incident, one would notice how journalists positively debunked the government’s official claim that the poor are not being targeted despite the common observation that an overwhelming majority who died came from the underclass in Metro
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extraordinarily powerful and compelling narratives and photographs because of
deferece to norms of fairness, balance, and sourcing.

Thinking about critical incidents and the modification of journalistic norms and
convention only strengthens the argument that norms and standards are shifting
that soon what is considered constant, like objectivity or neutrality, might no
longer be so in the long run, especially when they were made to bear on critical
incidents. The latter should not be thought as a short and singular moment but a
prolonged period, like Duterte’s drug campaign, where contradictions, polariza-
tions, and resistance became apparent. Overall, auto-analysis within critical inci-
dents poses a radical challenge to professionalized and institutionalized practices of
media organizations by overt oppositional practices. It brings about ways of
re-imagining journalism in the time of a crisis.

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3.2

BOUNDARY WORK ON MEDIA FREEDOM AFTER THE PHONE HACKING SCANDAL IN THE UNITED KINGDOM

Binakuromo Ogbebor

In 2005, the now-defunct British tabloid newspaper *The News of the World* was accused of hacking the phones of members of the British Royal Family. The initial police investigation concluded that the crime was committed by two people, royal editor Clive Goodman and private detective Glenn Mulcaire (Keeble & Mair, 2012). The police report also declared that the victims were only a few public figures. In 2011, further investigations revealed that phone hacking was pervasive at *The News of the World* (Davies, 2014). The list of victims included a murdered 13-year-old schoolgirl, Amanda Jane “Milly” Dowler, relatives of deceased British soldiers, and victims of the July 7, 2005 London bombings (Marsh & Melville, 2014). The hacking of Milly Dowler’s phone, in particular, caused public outrage against *The News of the World*; advertisers withdrew patronage from the newspaper and in July 2011, the 168-year-old company closed (Davies, 2014; Keeble & Mair 2012).

By 2014, there had been jail sentences and more than 100 arrests linked to the scandal (Ponsford, 2014). There were further allegations as well as confirmation that journalists from other newspapers were involved in phone hacking and other unwholesome journalistic practices (Keeble & Mair, 2012; Trinity Mirror, 2015). It became clear early in the controversy that this was not just about one rogue newspaper but the entire British press. The phone hacking scandal led to the formation of the Leveson Inquiry into culture, ethics, and practices of the press, creating a forum for a debate on press reform.

Among the outcomes of this scandal were the setting up of a Royal Charter on press self-regulation; the closure of the then press self-regulatory body, the Press Complaints Commission (PCC); the setting up of a press regulatory body, the Independent Press Standards Organization (IPSO); the setting up of another press regulatory body which signed up to the Royal Charter, the Independent Monitor for the Press (IMPRESS); and, in 2019, the Cairncross Review, which sought to
ensure a sustainable future for quality journalism. Thus, the phone hacking scandal emerged as a critical incident that sought to define the boundaries of British journalism. This chapter shows how, following a critical incident in British journalism, journalists and stakeholders in the country sought to delineate the boundaries of press freedom and regulation in the debate that followed the phone hacking scandal and the Leveson Inquiry.

Press freedom and an effective press regulatory system have been identified as vital to the sustenance of democracy because only a free press can provide a check on the powerful to ensure that they are accountable to society and only an effective press regulatory system can check the press to ensure it does not abuse its power to control information (Curran & Seaton, 2010). Thus, much effort and resources have gone into attempts at achieving press freedom and a successful press regulation. An investigation into what journalists and stakeholders of the press understand by press freedom and successful press regulation is important because an understanding of what is to be achieved is integral to its achievement. In the following section, I provide a brief background on the debate about press freedom. This will facilitate an understanding of the boundary work on press freedom later in this chapter.

**Press freedom**

The Royal Commission of the Press 1977 defined press freedom as “that degree of freedom from restraint which is essential to enable proprietors, editors and journalists to advance the public interest” (cited in Frost, 2007, p. 43). In simple terms, it is the provision of an environment in which the media can freely receive and disseminate information without censorship. At the time of writing, press freedom in the United Kingdom was based on the human right to free expression. The right to free expression in the UK as contained in the Human Rights Act of 1998 was derived from the European Convention on Human Rights (ECHR). Article 10 of the ECHR protects the right to express as well as receive opinions and information. Freedom of expression empowers the public to express their views in public debates and enables journalists to investigate and expose corrupt practices by the powerful in society. Freedom of expression is, therefore, integral to the sustenance of democracy and good governance.

Freedom of expression requires beneficiaries to use it responsibly (Human Rights Act, 1998). Citizens must not overstep their boundaries in the freedom of expression. The state must not censor the press needlessly and must protect the right to freedom of expression by the media. This is essential if the media is to fulfil its role of protecting democracy. The right of members of the public to express their views on this matter should also be protected. Protection of press freedom by the state must be accompanied by a commensurate protection of the right to freedom of expression by individuals.

The press, for its part, must respect citizens’ right to privacy. The British press has often been accused of abusing its freedom through invasion of privacy and
defamation of character. Many have asked whether “the media have gone too far, too often” especially since the death of Princess Diana in August 1997 (Beveridge & King, 2001, p. 88) and more recently, with the hacking of the phones of members of the public by The News of the World. Article 10 (2) of the Human Rights Act (1998) has guidelines in place to check the abuse of freedom of expression. There are laws in place for the protection of the freedom of others. For example, the law on defamation allows the award of compensation if a person’s reputation has been dented. There is also a law against the interception of private communication through covert means such as hidden cameras and computer hacking (Regulation of Investigatory Powers Act, 2000). These laws, though not solely for the press, are used to ensure that the media do not overstep their bounds in the exercise of their freedom.

Paradigm repair, boundary maintenance, and sub-interpretive spheres

My analysis of how journalists attempted to define the boundaries of press freedom in the debate that followed the News of the World phone hacking scandal is based on the neoliberal variant of the libertarian theory and the theory of social democracy. The concept of paradigm repair is also employed because media representation of the press is often characterized by paradigm repair strategies (Carlson & Berkowitz, 2014; Thomas & Finneman, 2014). Paradigm repair describes “how journalistic self-criticism protects existing paradigms rather than confronts entrenched deficiencies and contradictions” (Carlson, 2016, p. 4).

My discussion of boundary maintenance on press freedom includes how the press protects the press freedom paradigm using the strategy of catastrophization. “Threat to the paradigm” and “threat to press freedom” are used interchangeably to talk about the press’s use of the strategy of catastrophization to protect its conceptualization of press freedom. This strategy entails the media’s use of diverse techniques to raise an alarm that the paradigm under scrutiny (in this case, press freedom) is under attack (Thomas & Finneman, 2014). My investigation revealed that rather than function as one interpretive community (Zelizer, 1993) in their attempt to define press freedom, the press instead functioned as two sub-interpretive spheres.

Sub-interpretive spheres emerge when journalism, rather than function as one interpretive community in their attempt to mark the boundaries of their profession (Zelizer, 1993), instead function as multiple homogeneous publics (Fraser, 1992). The multiple spheres of homogeneous discourses created within a journalistic community are what I refer to as sub-interpretive spheres. Multiple sub-interpretive spheres can arise from differences and similarities in the press’s interpretations of journalistic paradigms, such as press freedom, objectivity, and news in the printed format. Sub-interpretive spheres may or may not be divided along the lines of media outfits because they are abstract spheres of discourses.
In the journalistic metadiscourse (news about journalism) that ensued from the *News of the World* phone hacking scandal and the Leveson Inquiry, the sub-interpretive spheres were divided along the lines of newspapers. My investigation revealed that there were two sub-interpretive spheres: one comprises *The Sun, Daily Mirror, Daily Express, Daily Mail* and *Daily Telegraph* while the other consists of *The Guardian*. The debate on press standards was often along the lines of these two sub-interpretive spheres. This grouping does not imply that newspapers in each of the two categories agreed on every point of the press standards argument. The homogeneity of a sub-interpretive sphere does not preclude disagreements on certain issues within that homogeneous public. My categorization of the sub-interpretive spheres was based on the degree of similarity in their expressions and interpretations of key points in the debate, particularly their views on what constitutes press freedom. There are diverse perspectives on what constitutes press freedom. A common view is that press freedom can only be achieved when journalism is self-regulated (Curran & Seaton, 2010).

**Self-regulation**

The British press operates a system of self-regulation. Self-regulation refers to a system where an industry sets up a body to “control standards in the industry” (Frost, 2007, p. 214). Such a body serves as a way of proving to their consumers that they are maintaining high standards. However, this does not appear to have worked well for the British press, as many have condemned its ethical standards (Frost, 2007; Petley, 2013). There has been a barrage of accusations on invasion of privacy, inaccurate reporting, and other forms of malpractice (Spark & Harris, 2010). Some scholars are of the view that statutory regulation of the British Press would help check press abuse of power (O’Malley & Soley, 2000). Statutory regulation is a system of regulation that is set up by law and supported by government (Frost, 2007).

The British press is averse to statutory regulation of the press (Curran & Seaton, 2010). Studies argue that the opposition of the British press to statutory regulation goes beyond a commitment to protect press freedom to a determination to control information without being accountable for its management (Curran & Seaton, 2010; Petley, 2013). This view was contested by much of the press in journalistic metadiscourse on the press reform debate that followed the *News of the World* phone hacking scandal and the Leveson Inquiry (Thomas & Finneman, 2014).

The Leveson Inquiry’s recommendation led to the setting up of the Royal Charter on self-regulation of the press in 2013 which was underpinned by statute. The Royal Charter cannot be amended without the approval of a two-thirds majority of both the House of Lords and the House of Commons (Department of Culture, Media, & Sport & Miller, 2013). Though there were opinion articles from all newspapers in the study sample that argued against the Royal Charter on press regulation, columns published in *The Sun, Daily Mirror, Daily Express, Daily Mail* and *Daily Telegraph* advanced the argument that signing up to the Royal Charter
on press regulation was a threat to press freedom because it was backed by statute (McTague, 2013) while those of The Guardian argued that a statute with the power to ensure that the Royal Charter on press regulation would not be easily overturned by politicians is not the same thing as statutory regulation of the press (Toynbee, 2013). Two perspectives of press freedom emerged in this debate: Neoliberal and social democratic.

Neoliberalism in relation to the press refers to a situation in which “the media is conceptualized primarily in relation to economic activity” (Freedman, 2014, p. 12). From the neoliberal perspective, self-regulation is integral to press freedom; the press must be self-regulated so as to have the autonomy it needs to call the powerful to account and fulfil its informational role in a democracy; the press should be commercially or privately owned because a “free enterprise is a prerequisite for a free press” and only a free press can sustain democracy (Royal Commission on the Press, 1949; cited in Curran & Seaton, 2010, p. 327); the press should serve the public interest (though what this means is contested) and to this end, a small role for the state is acceptable, for example, in the making and implementation of laws that can prevent market failure and guarantee fair competition in business. Other aspects such as service and accountability, it contends, should be left in the hands of the media’s self-regulatory bodies and the market (Phelan, 2014).

The neoliberal conceptualisation of press freedom is hegemonic (that is, common-sensical) in discourses about media policy (Plehwe et al., 2006). Alternative interpretations of press freedom are often marginalized or presented as illogical in the light of hegemonic neoliberal interpretations of press freedom (Curran & Seaton, 2010; Putnis 2000). However, counter-hegemonic discourses labelling the neoliberal theory of the press as anti-democratic and calling for a more public service-oriented model appear to be on the rise within the academic literature (Freedman, 2014; Pickard, 2015; Schlosberg, 2017). There is a growing consensus that the press should not be treated as a mere commodity but as a vital organ for democracy (Pickard, 2015). Proponents of this view advance interpretations of press freedom that are based on the theory of social democracy.

The theory of social democracy has emerged as a major challenger of the neoliberal hegemony in debates about press policy. This theory sees the state as the custodian of the public interest and as such it accepts state intervention in press regulation for the improvement of press standards (Heywood, 2017; Meyer & Hinchman 2007). Proponents of social democracy are critical of the “negative liberty” advanced by the neoliberal variants of the libertarian press theory where press freedom is interpreted as freedom from state interference (Meyer & Hinchman, 2007). They argue that the foundations of democracy become weak and unstable if accountability is solely market-driven because this could result in inequalities in society and go against fundamental human rights such as the right to privacy (McChesney, 2001). Instead of leaving press accountability entirely at the mercy of the market, social democracy advocates a conceptualization of press freedom that balances the freedoms of all parties in a democracy, be it the rights of ordinary members of the public or the freedom of speech (Pickard, 2015).
Critics of social democracy argue that the theory is idealistic and underestimates the possibility of state intervention to impact negatively on democracy (Keane, 2016; Uluorta, 2009) but Cushion (2012) contends that measures can be taken to ensure that statutory intervention does not endanger press freedom. These two positions shaped the representation of arguments relating to press freedom in the coverage of the debate that followed the phone hacking scandal as we shall see in the following section.

**Discourse analysis of boundary maintenance on press freedom**

In this section, Fairclough’s (1995a, 1995b) three-dimensional analytical model (discursive, linguistic, and social practice) of critical discourse analysis is used to explain how journalists attempted to define the boundaries of press freedom in the media policy debate. Examples are drawn from news coverage of the media policy debate in six British national newspapers: The Guardian, Daily Telegraph, Daily Express, The Sun, Daily Mirror and Daily Mail. The period of coverage is from November 14, 2011 (when the Leveson Inquiry was set up) to November 14, 2014 (the aftermath of the sealing of the cross-party Royal Charter on press regulation).

In the sub-interpretive sphere comprising all newspapers examined except The Guardian, the “threat to the paradigm” (catastrophization) strategy was used to warn against state intervention in press regulation. For instance, doom-laden phrases such as “slippery slope to the licensing of the press” (Harris, 2013); “damage to our democracy” (Dunn, 2013); and the loss of “300 years of press freedom” (Hodges, 2013) were used to warn readers that any proposal for press regulation with statutory backing was a threat to press freedom.

The sub-interpretive sphere made up solely of The Guardian denounced such warnings as a “false alarm”. It did this by deconstructing the arguments made by the other newspapers. For example, where other newspapers used headlines such as “Royal Charter causes outrage as freedom of the press is cast aside after 300 years” (Little & Brown, 2013), The Guardian countered such discourses with headlines such as “Press freedom: a tug of war, not the end of 300 years of glorious liberty”:

The chorus of mostly Tory editorial writers and columnists who have been denouncing any external constraint on their right to have a good time keep claiming that Britain is facing the end of “300 years of press freedom.” Stirring stuff, but not true. Why should we believe their dire predictions for the future when they can’t even be bothered to get the past right?

*(White, 2013b)*

The article went on to explain why it considered that rhetoric to be untrue. In step with The Guardian’s apparent social democratic approach to press freedom, the paper challenged neoliberal perspectives by describing the rhetoric of “the 300 years of press freedom” as one born out of the self-interest of media proprietors.
and their staff (White, 2013a). The Guardian’s argument queried the accuracy of the information that Britain has had approximately 300 years of press freedom.

All newspapers except The Guardian, regardless of their classification, advanced the warnings of threat to the press freedom paradigm but the tone of language was harsher in the tabloid and mid-market newspapers. For example, while The Sun used the headline, “PM a political dwarf” (Kavanagh, 2013) for an editorial that condemned the then-Prime Minister David Cameron’s succumbing to calls for the Royal Charter on press regulation to be underpinned by statute, the Daily Telegraph’s editorial on the same issue had the headline “MPs cross the Rubicon on press regulation” (Daily Telegraph, 2013). The Sun’s article likened David Cameron’s spokesperson and the then-Conservative MP for West Dorset, Oliver Letwin, to a “tethered goat,” described the then-Labour leader Ed Miliband as “geeky” and a “Marxist-born lefty,” the former Prime Minister Gordon Brown as an “ex-grunt,” and actor Hugh Grant as a “faded showbiz luvvie.” Of all the newspapers, The Sun’s tone of language was the most aggressive and demeaning.

The journalistic metadiscourse of all the newspapers except The Guardian was often constructed to portray the public as the victim of any form of statutory intervention in press regulation. Linguistic devices such as hyperboles, “you-centeredness” (direct address), sensational vocabulary, and powerful imagery were employed to make the reader visualize the press as the crusader and the public as victims, while politicians, victims of press abuse and campaigners for such victims appear as villains. For example, an article in the Daily Mail captioned “A rotten day for freedom” stated:

They want to ordain how we run your newspapers. They’ll be coming after you next, mes bravos. Thou shalt not think impure thoughts. Thou shalt conform and applaud the Westminster elite. All hail to The System. All must subscribe to egalitarianism. All must suppress their inner eruptions. Control, control: This is the impetus.

(Letts, 2013)

In this article, the linguistic device of “you-centeredness” (Marston, 2002, p. 86) was used to persuade the reader to see politicians, victims of press abuse, and campaigners for such victims as their enemies. This interpretation runs contrary to Lord Justice Leveson’s claim that his proposal of a statutorily backed press regulatory body would protect the members of the public from press abuse (Leveson, 2012).

As with Putnis’s (2000) analysis of newspaper coverage of the media policy debate in Australia, echoes from George Orwell’s 1984 were used to strengthen arguments against statutorily backed press regulation; presenting it as a threat to press freedom (Beattie, 2013; Nelson, 2012). For example, a columnist for the Daily Express wrote:

In practice, statutory regulation would mean government censorship. Our reading matter would be vetted by official bureaucrats, accountable not to the
public but to the politicians, Whitehall and probably even the European courts. We would soon be sliding down the road towards Orwell’s Ministry of Truth, the sinister organization that directed the press in the novel 1984.

(McKinstry, 2012)

Similarly, in its comments section, the *Daily Mail* stated “But today MPs must put such petty bitterness aside. Labour and the Lib Dems should remember they are the heirs of Hardie, Orwell, and John Stuart Mill – true giants in the fight for freedom and democracy” (*Daily Mail*, 2013a). These quotations also reveal the press’s use of the “us” and “them” contrast (Marston, 2002) to position themselves on the side of their readership, thus creating an in-group (using “We” and “Our”) with the policymakers as the outsiders and potential enemy.

Again, *The Guardian* countered the other newspapers’ interpretation of press freedom as press regulation free of any statutory backing as can be seen in the statement of its editor, Alan Rusbridger:

*The Guardian, FT,* and *Independent* agreed with the parliamentary route [statutory underpinning]. It is unclear why Milton, Wilkes or Orwell would be happy to bequeath freedom of expression to the government of the day.

(Rusbridger, 2013)

These sentiments were echoed in an article by columnist Polly Toynbee:

The public rightly snort in derision at high-flown cant about press freedom while scoundrels brandish quotes from Milton and Orwell as cover to let them bully as they please.

(Toynbee, 2013, p. 29)

All newspapers except *The Guardian*, used hyperbolic comparisons to advance the argument that a statutorily backed regulatory body would make Britain a totalitarian regime like Russia, China, Iran, Venezuela, Zimbabwe, or Saudi Arabia and warned that even such regimes are appalled by Britain’s decision (*Daily Mail*, 2013b). A *Daily Mail* headline read “How even the Kremlin and Iran scorn Britain for shackling a free press – from New York to Sydney, the world condemns appalling and unimaginable gag on liberty” (*Daily Mail*, 2013b) and an article written by the then-Mayor of London, Boris Johnson, for *The Daily Telegraph* stated:

All my life I have thought of Britain as a free country, a place that can look around the world with a certain moral self-confidence. How can we wag our fingers at Putin’s Russia, when we are about to propose exemplary and crippling fines on publications that do not sign up to the regulatory body? How could we have criticized the Venezuela of Hugo Chavez?

(Johnson, 2013)
The Guardian contested these warnings, arguing that the YouGov poll quoted to back up their argument also mentioned that 63% of Britons did not trust the industry to set up a fair system of press regulation (Wilby, 2012, p. 30). I argue that the neoliberal concept of press freedom is a paradigm that the commercial press fought hard to protect rather than scrutinize to see if there is a need for change or modification. It can be argued that the goal of propagators of the neoliberal press ideology was not to promote investigative journalism or enhance democracy as the proponents’ claim, but to serve the commercial interests of media owners by preventing stringent controls that will check the invasion of privacy and other means through which the press gets sensational stories that sell (McQuail, 2010; Pickard, 2015).

The neoliberal interpretation of press freedom has been criticized for being too market-focused (McChesney, 2001). As Freedman (2014) and Pickard (2015) have argued, the vital role the press plays in the sustenance of democracy warrants that it not be treated like a commodity. It can be argued that in the coverage of the debate that followed the phone hacking scandal and the Leveson Inquiry, The Guardian served as the social democratic challenger of the neoliberal press theory which, arguably, governed the definition of press freedom advanced by all the other newspapers examined. Whether or not The Guardian was a selfless crusader speaking up for the voiceless; a left-wing press pitting itself against some right-wing counterparts; a newspaper trying to protect its crusader image by advocating measures to regulate the press that it had no intention of succumbing to; a rival newspaper trying to keep afloat in a bullish media oligopoly; or anything else, can certainly be debated.

Conclusion

Using Fairclough’s (1995a, 1995b) three-dimensional analytical model (discursive, linguistic, and social practice) of critical discourse analysis, this chapter revealed how journalists attempted to define the boundaries of press freedom in the debate that followed The News of the World phone hacking scandal and the Leveson Inquiry. My investigation revealed that the British press did not function as one interpretive community in their definition of press freedom but as two sub-interpretive spheres. The Sun, Daily Mirror, Daily Express, Daily Mail and Daily Telegraph made up one sub-interpretive sphere while the second interpretive sphere consisted of The Guardian.

The sphere to which many of the newspapers belonged interpreted press freedom based on the neoliberal theory of the press which advocates press self-regulation without state interference while the second sub-interpretive sphere (The Guardian) adopted a social democratic approach which welcomed state interference in the form of a statute-backed press regulatory body, arguing that minimal state intervention in press regulation to ensure press accountability would not result in a loss of press freedom.
The Sun, Daily Mirror, Daily Express, Daily Mail and Daily Telegraph used the paradigm repair strategy of “threat to the paradigm” or catastrophization to warn that the Leveson Inquiry’s proposal of a press regulatory body underpinned by statute is a slippery slope to press censorship. Their argument followed the plan to set up, and eventual establishment of, the Royal Charter on press regulation. In keeping with Lord Justice Levenson’s proposal for press regulation underpinned by statute, the law establishing the Royal Charter cannot be repealed without a two-thirds majority from both Houses of Parliament. Countering the neoliberal press’ argument that this would amount to a loss of press freedom, The Guardian advanced the argument that a “dab” of statute to prevent the Royal Charter on press self-regulation from being abrogated easily will not amount to a loss of press freedom.

The fact that The Guardian challenged the neoliberal perspective of press freedom shows that the press does not always function as one interpretive community when it goes about maintaining the boundaries of its profession. I argue that though multiple spheres of homogeneous discursive publics are closer to the democratic ideal, the problem here is that the bulk of the press (five out of six newspapers in the study sample) advanced the neoliberal perspective as compared to one (The Guardian) which advanced a social democratic view. The danger this poses to democracy is that propagators of the neoliberal perspective have an unfair advantage over the propagators of other views because their perspective reaches the bulk of the print readership. Even with its combined print and online readership of about 9 million at the time of the coverage, the reach of The Guardian is trumped by the combined print and online readership of the six newspapers.

The boundary work on press freedom in the coverage of the media reform debate that followed the News of the World phone hacking scandal demonstrate, among other things, that steps need to be taken to ensure that the press serves as a democratic public sphere during debates about media policy because only then can such debates produce the enlightenment, innovation and sensitization that can result in effective media reforms. An in-depth analysis of the perceptions of media reform campaigners and media practitioners on the impact of media reform after the Leveson Inquiry will be a good way to build on this study.

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3.3

UNITED IN PROTEST

Coverage of attacks against journalists in the 2019 Hong Kong demonstrations as a critical incident

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Hong Kong, the former British colony before the 1997 handover to China, has drawn global attention since a massive demonstration broke out in June against an extradition bill initiated by Chief Executive Carrie Lam. The bill would have allowed criminal suspects to be sent to mainland China for trials. Fearing that the bill could damage Hong Kong’s judicial independence promised in both the 1984 Sino-British Joint Declaration on the Future of Hong Kong and the 1990 Basic Law of the Hong Kong SAR (Foster, 1998), thousands of protesters wearing black shirts and masks took to the streets to demand the full withdrawal of the bill and the implementation of universal suffrage (Berlinger & Cheung, 2019).

The clashes eventually escalated to violence. A Hong Kong police officer shot an 18-year-old student protester in the chest on National Day, the 70th anniversary of the People’s Republic of China (Chan & Givetash, 2019). Many storefronts, cafes, subway entrances, and banks were vandalized, and many individuals were assaulted (Ives & Wong, 2019). An attack by protesters on the Hong Kong Liaison Office resulted in the Chinese national emblem being defaced with black paint (Linder, 2019), triggering a strong nationalistic sentiment in mainland China. In response, Hong Kong police fired tear gas and rubber bullets at the crowd (Lung, 2019).

Journalists covering the protests have also been caught in the chaos. According to reports from around the world, reporters have faced attacks from both protesters and the local police. An Indonesian news reporter lost an eye after a rubber bullet from a Hong Kong police officer hit her in the face (Harrison, 2019). News reporters from *South China Morning Post* and Hong Kong local public broadcaster RTHK were injured by rubber bullets and unknown projectiles during the National Day protests (Chan, 2019). Meanwhile, local journalists have faced violent, arbitrary police tactics, including harassment and arrests (Sataline, 2019). Journalists have also encountered personal insults and even racial discrimination.
These cases and other attacks on those covering the Hong Kong protests led journalists, from both local and international news outlets, to respond in the form of journalistic discourse. This discourse revealed consistent and diverging understandings of what constitutes legitimate journalism and the function it serves in a society, reinforcing important distinctions between the values of independent and state-owned media.

The Hong Kong protests as a critical incident

News coverage of the Hong Kong protests has continually addressed the role of journalists in the conflict, including threats and attacks toward local and foreign journalists and conflicts between protestors and Chinese state-owned media, as well as conflicts between pro-Beijing and local independent media. Through the resulting news and opinion articles, these journalists formed competing interpretive communities (Zelizer, 1993) in which they discursively reinforced their authority to document the events in Hong Kong, their legitimacy as professional journalists fulfilling a societal function, and the boundaries defining acceptable and unacceptable journalistic practice but with differing values and goals.

Boundary work in journalism refers to journalists’ efforts to discern “who counts as a journalist, what counts as journalism, and what is appropriate journalistic behavior” (Usher, 2017, p. 1116). In the Hong Kong protests, journalistic boundary work was evident in criticism of Chinese state-owned media and their suggestions that the protests were invalid or unnecessary, as well as efforts of China’s state media to distinguish professional journalists from amateur journalists, such as through emphasizing investigations and fact checking, the value of objectivity and balance in reporting, and the ability to access authoritative news sources (Tong, 2015).

The Hong Kong protests reinforce the importance that journalists place on autonomy, or the ability to report freely when faced with “perceived extra-journalistic forces” (Deuze, 2005, p. 448), as an ideal-typical value that allows them to protect their work from the influence of outside actors. It also illuminates the ways journalists engage in institutional discourse to negotiate their social roles and democratic contributions amid “the complexities and uncertainties of news making” (Hanitzsch & Vos, 2017, p. 129), which can be particularly salient in a repressive media environment.

The frequent attacks against journalists and coverage documenting it situate the Hong Kong protests as a critical incident (Zelizer, 1992) in journalism. These events function as discursive opportunities for journalists to unite their interpretive community through reasserting their authority, credibility, legitimacy, and value to society (Carlson, 2017; Zelizer, 1993). In the case of the Hong Kong protests, the journalistic discourse also revealed competing interpretive communities in which journalists raised concerns about safety; identity and authority; press freedom; and professional values and norms in different political, social, and cultural contexts.
Research design

This chapter examines news articles and editorials describing how journalists covered, were involved in, and were affected by the Hong Kong protests. We considered coverage in both English- and Chinese-language news outlets to address how the outlets covered the protests, how they discursively constructed journalistic authority within coverage, and questions they raised about the societal value of journalistic work and challenges to press freedom that arose.

For English-language outlets, we combined a Google News search with searches of the LexisNexis and Factiva databases. For the Chinese-language coverage, we used LexisNexis to gather articles. The selected articles were published between June 9, 2019, when the protests began, and November 4, 2019, two days after the Xinhua News Agency was vandalized by protesters. For English-language outlets, we used the search terms “Hong Kong protest,” “protests,” “journalist,” and “reporter.” For Chinese-language outlets, we used the search terms “Hong Kong protest,” “Hong Kong Journalists Association,” and “freedom of the press.” The search yielded 167 English-language articles and 38 Chinese-language news articles.

The Chinese-language articles were published by news media in mainland China, including Xinhua News Agency, People’s Daily, Global Times, People.CN, and Shanghai Observer; those from Hong Kong, such as Sing Tao Daily; and those from the US, such as Epoch Times and VOA Chinese. The English-language articles were published by news media around the world, including The New York Times and Business Insider in the US, The Independent and The Guardian in the UK, The Sydney Morning Herald in Australia, and the South China Morning Post in China.

We used a thematic analysis to assess the headline approaches and sourcing techniques of each article, as well as decipher the news frames employed by different media outlets. One author analyzed the Chinese-language articles and one author examined the English-language articles. After an initial reading of the articles in which we identified broad themes, we conducted a secondary reading to assess specific elements of the research questions. The secondary reading considered: 1) how the articles presented threats to journalists’ safety; 2) how they differentiated journalists from non-journalists; and 3) how they constructed journalistic authority, including the role of press freedom and journalists’ social and democratic functions. This approach offered us a conceptual map for coding based on journalism boundary work.

Chinese-language media

All pro-Beijing Chinese-language news media, whether from mainland China or Hong Kong, focused on local protestors perpetrating violence against state-owned news media outlets and journalists. For example, in covering the Global Times news reporter who was physically assaulted at the Hong Kong airport, Xinhua News Agency primarily cited a statement made by the All-China Journalists Association
(中华新闻工作者协会) condemning the violence and calling for justice for journalists. The coverage used emotionally charged language:

The statement points out that All-China Journalists Association strongly condemned the violence against mainland Chinese journalists, and we very much feel indignant about it … Physical violence and illegal detention of journalists present insults to journalism and pose serious violation to freedom of the press.

An opinion piece from Beijing local news website bjd.com.cn focused on the protesters who vandalized the Xinhua News Agency headquarters in Hong Kong. The article called protesters “rioters who are creating a black horror that challenges civil society.” In the article, the protesters were framed as violent rioters with zero tolerance for news media holding different viewpoints, despite their advocacy for press freedom. Additionally, several news media from mainland China focused on the mainland female journalist harassed by Hong Kong journalists during a police press conference. In a report published on the Tencent News website, Hong Kong journalists who worked for pro-democracy outlets were framed as hypocrites holding double standards against news reporters from the Chinese mainland.

**Press independence and violence**

Two values are embedded in pro-Beijing news outlets’ coverage of the Hong Kong protest. First, news reporters have a right to report, and any intervention against this practice should not be tolerated. Second, violence, especially against the press, should never be considered as a legitimate means to advance a cause, even if it is under the banner of freedom. These values resonate with two important Asian cultural values: freedom with responsibility, and social harmony and stability (Massey & Chang, 2002). In concert with these deeply embedded values in Chinese society, pro-Beijing news outlets framed themselves and their reporters as vanguards of the free press who cautiously reported on the Hong Kong issue with a strong sense of social responsibility. That is, by informing readers about the violence in Hong Kong, pro-Beijing media outlets prioritized the value of social stability over the western idea of democratic governance, a value upheld by the protesters.

Pro-Beijing news outlets implicitly sided with the Chinese Communist Party’s stance on the Hong Kong issue. This discourse also framed the protesters as perpetrators of violence. By focusing on protesters’ violence against state-owned media and journalists, mainland Chinese news media created a discourse that the violence and harassment instigated by “rioters” (protesters) constitute a threat to press freedom in Hong Kong. Therefore, it discredited the legitimacy of pro-democracy protesters in Hong Kong and cast them as freedom fighters seeking to initiate violence and disrupt the social order. Such framing in mainland Chinese-language news media is ironic: Chinese news media whose autonomy is limited by state censorship only began to cite the importance of journalistic independence when Hong Kong protesters disrupted a mainland reporter.
In contrast, by claiming that Hong Kong authorities suppressed those press publishing dissident opinions and that Hong Kong police arbitrarily used force against news reporters, the protest led pro-democracy Chinese-language outlets in Hong Kong and overseas to ask two questions about freedom of the press: 1) do the authorities have legitimacy to censor news of different opinions, and 2) do the police have the right to use violence on news reporters? By asking such questions, the Hong Kong authorities and the police were equated with the repressive, totalitarian regime in Beijing, while reporters covering the protests were framed as freedom fighters standing with the protesters and challenging suppression and police brutality. These discourses identify police brutality against news practitioners as well as local authorities withholding information from the press and the public as the real threats to press freedom in Hong Kong.

**Media bias and fairness**

News media from mainland China also questioned the credibility of Hong Kong local news outlets holding different viewpoints from authorities. An opinion column in the *Shanghai Observer* accused the Hong Kong local outlet *Apple Daily* of fabricating news about the protest, producing sensationalized, irresponsible coverage that misled the public, as well as instigating violence against police and authorities. Hong Kong local newspaper *Sing Tao Daily* employed similar rhetoric to discredit local media. This highlights another value that pro-Beijing journalists cherish: Journalists should avoid formulaic and sensational coverage and be responsible in their reporting, especially in terms of word selection and media narratives. Specifically, pro-Beijing outlets have accused the western media and pro-democracy news outlets in Hong Kong of presenting one-sided coverage casting the Hong Kong SAR and the police in a negative light while ignoring violence perpetrated by the protestors. As an editorial appearing on *Sohu news* argued:

A few Hong Kong outlets and the Western media have been constantly reporting one-sided stories or even distorting the truth … It seems that their camera lens is always aiming at the law enforcement agents who try to maintain the social stability. They always wait to capture a “perfect” moment when a police officer raises his side-arm or baton. Once that moment is recorded, they start to point out the overuse of force by the police. They never bother to ask or investigate why that police officer raises his side-arm or baton. All they see is the police brutality.

Sensationalized coverage, according to mainland Chinese news media, was reflected in the exaggeration of so-called police brutality against protestors and reporters. News media in mainland China suggested that Hong Kong police acted professionally, and efforts to highlight violence against protestors were framed as biased and unethical. The criticism from news media in mainland China was grounded on
the claim that local Hong Kong news media distorted the truth about the protest and instigated the violence by unethically spreading rumors and one-sided, biased reporting. The overall tone in this coverage demonstrated that Chinese news media believed that ethical journalism practice was about presenting neutral, fact-based, contextualized news coverage that could provide readers with different perspectives of the covered events. They also emphasized that social responsibility should be routinized in journalism practice.

China’s news media employed a villain-hero media narrative praising those who toed the line with the government while discrediting protesters. Outlets such as Xinhua News reported that the Hong Kong independent outlet Apple Daily served as an “instigator” helping “rioters” through their one-sided tone as well as by asking Hong Kong officials “very unfair” questions, such as, “Carrie Lam, when will you die?” This villain-hero narrative reflected the Asian values of harmony, or maintaining social stability and respect for orders and authority (Massey & Chang, 2002). In this narrative, the protestors were villains who uprooted a peaceful, stable Hong Kong society, while those who supported Beijing’s stance were heroes who believed in authority and the need to maintain a stable, prosperous Hong Kong.

**Questioning legitimacy and professionalism**

The 2019 Hong Kong protests led journalists at pro-Beijing media outlets to ask two questions: 1) Who is a journalist, and 2) in covering news events like the Hong Kong protests, what kind of journalism practice is considered “professional”? An article from Tencent News reported that some Hong Kong citizens petitioned the government to issue a license to journalists so that “fake” news reporters, such as freelancers, bloggers, and student journalists, would not harass the police. A news report from Sing Tao Daily cited an anonymous scholar who called citizen journalists non-professional, unqualified news practitioners without accreditation from authorities. In doing so, citizen journalists’ credentials as news reporters were de-legitimized.

By highlighting their lack of official accreditation, news narratives circulated in mainland China and Hong Kong local pro-Beijing news outlets discredited citizen journalists by drawing a boundary between “legitimate” news reporters and “non-legitimate” ones. That is, it is only with accreditation or a press license obtained from government officials that journalists should be treated as legitimate news workers. Otherwise, they should not even be regarded as journalists, although some were engaged in newsgathering. As one editorial in Xinhua News said:

The Hong Kong Journalist Association was founded in the year of 1968. The standard for joining such associations is very low. Bloggers, freelancers, and even journalism major college students are allowed to join in this organization. According to one Hong Kong local media outlet, as long as someone pays the registration fee of 150 Hong Kong dollars, s/he all of sudden becomes a “journalist.”
Another means for Chinese mainland news media to discredit journalists who did not have accreditation from the authority was to deliberately blur the boundary between the so-called “fake” reporters and violent protestors. In a report on the Sohu News website, the author suggested, without citing a source, that so-called local reporters at the front of the protest were de facto violent rioters. They harassed police officers and obstructed the law “in disguise of being a news reporter.”

From this editorial, the pro-Beijing Chinese-language media distinguished between “professional journalists” and “non-professional” ones: The former is someone accredited by the authority, and the latter is someone who has other occupations and whose press credentials are not validated by the authority. Such distinctions sought to appeal to local audiences’ (mainland China news readers and pro-Beijing Hong Kong locals) traditional understanding of what is deemed as acceptable, legitimate, and professional journalism practice.

Two distinct sets of journalistic values were reflected in Chinese-language media coverage of the Hong Kong protests. On one hand, journalists working for pro-Beijing Chinese-language news media saw themselves as trained media professionals, endorsed by the Chinese authority, who held up the journalistic values of neutrality and social responsibility. Their emphasis on acquiring a license to practice “legitimate” journalism, contextualizing news coverage, and promoting social harmony and stability supported these values. On the other hand, journalists working for pro-democracy Chinese-language news outlets saw themselves as watchdogs holding the powerful to account, supporting the Western ideal of an independent press with freedom of speech. Their values were reflected in their questioning tone toward the Hong Kong authority and police in their coverage.

**English-language media**

International and local English-language news outlets frequently covered attacks against journalists by police, protestors, and members of the public, illuminating their experiences on the ground in Hong Kong and reinforcing the importance of autonomy and press freedom. Local media called for official statements from politicians and police in response to attacks and highlighted efforts by journalists’ associations to unite. This journalistic discourse called attention to significant occurrences affecting journalists within the protests and reinforced the role of independent news media as both chroniclers of and participants in these events.

**Responding to attacks**

English-language news organizations focused on covering attacks against local and international journalists by police, including physical assaults, firing tear gas and pepper spray, and attempting to quash reporting. Reports described the circumstances of attacks and the physical and emotional toll they took on journalists. In documenting these attacks, journalists sought to highlight the extreme lengths to
which they must go to independently and fully report the news, particularly in a repressive media environment.

Reports presented the attacks and perpetrators in harsh terms, using phrases such as the “mistreatment of frontline journalists,” “getting in the line of fire,” and “police terrorism.” An Associated Press article vividly described attackers using umbrellas to beat people in a subway station, noting that a Stand News reporter “suffered minor injuries to her hands and shoulder and was dizzy from a head injury.” An account from The New York Times offered insights into the experiences of journalists and the steps they took to protect themselves from tear-gas attacks:

We needed regular supplies of neon yellow press vests; helmets that aren’t military grade – those are too heavy and impractical – but are still strong enough to withstand some of the rough-and-tumble that you get from being out on the streets; decent masks for dealing with tear gas; and goggles for the same purposes.

A journalist from The Atlantic described an escalating scene at a protest, in which Molotov cocktails and bricks flew around them as police officers advanced:

After a riot officer pulled Tommy [an interpreter] from me, two officers ahead suddenly turned toward me and pushed me backwards with their round shields. As another officer pulled me backwards, a fourth shoved me hard on my chest. I crashed into a billboard, saved by my skateboard helmet.

In an incident covered by multiple newspapers, an Indonesian journalist was hit in the eye by a rubber bullet fired by a police officer and blinded permanently. Reports reinforced that the journalist was wearing a helmet and goggles as well as a high-visibility press vest, emphasizing that the attacks were specifically directed at journalists. Other accounts of attacks noted when journalists were physically identifiable, and they emphasized the size and notoriety of the outlets with which journalists were affiliated. Articles also revealed the challenges journalists faced in reporting the attacks, with one from the South China Morning Post noting that in the aftermath of officers pushing reporters and photographers at the front line, “Video footage taken at the scene showed some officers involved in the clashes had not displayed their identity numbers or shown warrant cards, making any potential complaint more difficult.”

In addition to featuring the perspectives of journalists, coverage frequently incorporated official responses. These responses were often used to emphasize the conflicting reasoning in police responses or a lack of response. An article in the Hong Kong Free Press, in describing a press conference in which journalists confronted police over their use of force, noted that an officer shouted at journalists and called them “you motherfucking journalist” while quoting another officer as saying, “I hope we can tolerate and understand each other.” Other articles included quotes from officers defending their actions, suggesting that some reporters stood too close to officers, others refused to move, and still others displayed
counterfeit press credentials, which necessitated officers’ use of force. Although the coverage reflected the norm of presenting both sides of a conflict, it tended to pit police officers against journalists, who emphasized that the attacks occurred without warning and exacerbated an already challenging environment.

Coverage also addressed attacks on journalists by protestors. Al Jazeera English described an attack by four men on a female reporter from Apple Daily, whose publisher, in the aftermath, said his newspaper “had ‘no fear of violence and will continue to defend freedom of the press and the public’s right to know.’” A New York Post account described a journalist for Hong Kong’s public broadcaster who was hit by a Molotov cocktail thrown by a protector, “which disturbing video shows left part of his head in flames.” Other journalists were spat on, kicked, punched, splashed with water, and called insults such as “traitor.” Highlighting the specific means of attack in these incidents offered a forum for journalists to reinforce their commitment to serving the public interest, even in threatening and dangerous circumstances.

Further, articles pointed to attacks against international reporters and those working with state-owned media. In one case, a Chinese-American journalist from The New Yorker, Jiayang Fan, was called a “yellow thug,” and demonstrators attempted to “stonewall her reporting,” according to Insider. A BBC reporter’s gas mask visor was smashed when he was hit in the face by a projectile. Multiple outlets covered an attack by protestors on the Hong Kong office of China’s state-owned Xinhua News Agency. The Hong Kong Journalists’ Association condemned the attack as an “act of sabotage against the media.” Four masked men forcibly entered the offices of the US-based media company The Epoch Times and set its printing machines on fire. Other articles described the attack by protestors at the Hong Kong International Airport on a man they called a “fake reporter” but who was a journalist with the state-run nationalistic newspaper The Global Times. This coverage suggested the presence of a single interpretive community (Zelizer, 1993) condemning violence against anyone deemed a legitimate journalist.

**Reinforcing legitimacy**

The coverage from English-language news organizations, in seeking to illuminate how these attacks challenged press freedom, often reinforced boundaries between legitimate and non-legitimate journalists, with professional journalists distinguished from amateurs, including citizen journalists and student journalists. Additionally, the state-run media were presented as operating outside the margins—particularly by international media—and, in some cases, deviant as a result of their loyalty to Beijing.

The Hong Kong Free Press described a journalism student at Ming Chuan University in Taiwan who had been covering the protests as a freelancer but, in seeking to protect himself, posed as a NowTV reporter. The article noted, “A student reporter has apologized after he wore a NowTV press vest when reporting on Hong Kong’s protests, despite not working for the broadcaster … He said that, as a student, he lacked the proper gear.” The Standard described a freelance journalist
who “hijacked a police briefing yesterday” to protest violence by police and their obstruction of journalists’ reporting on the demonstrations.

Efforts to distinguish legitimate journalists were also evident in responses to police’s attempts to remove reporters’ masks. One article cited a statement from The Hong Kong Free Press, which said, “Journalists are committed to defending the freedom of the press with due diligence and plain reporting and should not be unnecessarily obstructed or suppressed.” This statement suggested a common aim among journalists was to fulfill Western ideals of autonomous reporting. An editorial in The South China Morning Post cited overreaching efforts by police, noting that:

Journalists doing legitimate reporting should not be subject to such harassment. Having to worry about it can make it harder to do their job properly. That said, they need to meet high professional standards to avoid providing an excuse to target them.

This statement created discursive boundaries around those deemed legitimate journalists, reminding them that press freedom is a privilege earned through accurate, responsible reporting.

News organizations frequently highlighted the differences between independent local media and state-run media. Articles in local news outlets referred to the ways state-run outlets covered the protests, emphasizing their differing accounts of events and ideological leanings. A Guardian article noted that after two months, “Chinese state media outlets have gone from near silence on the protests and blanket censorship of footage of the demonstrations to actively pushing news, editorials, videos and online discussions.” The article quoted a Hong Kong professor who called the mainland media “purely propaganda” and emphasized the framing of protestors as “radicals” and “thugs” with an emphasis on clashes between protestors and police.

Some coverage reported that although initially little protest footage was shared via Chinese outlets, CCTV had begun airing interviews with pro-police demonstrators, and state media eventually condemned the attacks by protestors on the Xinhua News Agency. Coverage, however, also noted that some Chinese citizens challenged state media narratives, such as The Guardian’s reporting on Chinese netizens posting articles online to “show the real nature of what is happening in Hong Kong.” This framing clearly presented state-run media and its coverage as unacceptable for local and international audiences to understand the Hong Kong protests, upholding the journalistic ideal of a free and independent press.

Joining the protest

In advocating for press freedom, journalists often became part of the protest movement, both informed by and reflecting the goals of the broader Hong Kong demonstrations. Many articles connected journalists’ attacks with those on the protestors and used editorial or first-person perspectives to reinforce why they were
dangerous. In doing so, journalists, particularly at local outlets, abandoned the norm of impartiality, openly celebrating journalists they saw as protesting for an honorable cause and highlighting their own involvement.

Articles often emphasized the sacrifices journalists made to bring news to the public. An India Times article compared journalists covering the protests to entering “conflict zones”: “Many of them have little or no hostile environment training and very often are not entirely sure of what might happen, since the situation is vulnerable.” The South China Morning Post described journalists as:

First to arrive and last to leave, journalists are as dedicated to their duty as the strongest supporters are committed to their cause. Even as protesters disperse, they stay, watching for potential clashes or arrests, their shifts stretching endlessly into the early hours – and, unlike for police officers, there is no such thing as overtime pay.

Articles also quoted press associations condemning attacks by police and protestors, calling for justice, and decrying attempts to stifle freedom of speech. A Shanghai Daily statement released in response to an attack by protestors on a supposed undercover police officer at the Hong Kong airport declared: “Their illegal detainment and brutal beating of a journalist is also an insult to the global press community and a serious violation of the freedom of the press.” This coverage aimed to stir emotion around the plight of journalists, comparing them to the protestors while highlighting their distinctive desire for press freedom.

In some cases, journalists became protestors, and many articles covered and praised these efforts. Journalists called out police brutality at press conferences, and in one case, many journalists attended a press briefing wearing helmets, masks, and vests. A South China Morning Post article noted that 6,000 people took part in a rally against police mistreatment of journalists, showing the public’s recognition of dangers to press freedom. The article described the attendees as “current, former and aspiring journalists as well as lecturers” and said they held signs reading “not your friends, not your enemies.”

This coverage typically presented journalists’ protest participation positively, highlighting the number of participants, the peaceful resistance strategies, and the motivations for demonstrating. A Hong Kong Economic Journal editorial writer said:

First of all, they are also Hong Kong citizens, and they have the right to express their views and sentiments about the extradition bill and related issues. They join the marches and rallies not as journalists but as ordinary citizens. They also probably feel that they are unfairly treated by the police when they are performing their duties.

This article justified journalists’ protest participation by privileging their identity as Hong Kong citizens over their identity as journalists while suggesting that doing so could bring them additional threats. This coverage allowed journalists to reinforce
their democratic role in society and remind readers of the threat posed by authoritarian influence.

**Conclusion**

The Hong Kong protests provided a vital opportunity to evaluate the ways journalists respond when their editorial autonomy and their lives are threatened. As the demonstrations grew in numbers and visibility, both local and international journalists descended upon Hong Kong to chronicle the events. They faced challenges in the form of verbal and physical threats from police officers, protestors, and members of the public. They chronicled these altercations in their news outlets, describing the forms of the attacks, how they physically and emotionally affected the journalists, and how journalists expected authorities to respond. Independent media also critiqued the lack of response or what they viewed as skewed takes by Chinese state-owned media. Taken together, these events represented a critical incident in journalism—an opportunity for journalists to reconsider and restate norms of journalistic practice (Zelizer, 1992).

These norms took different forms. Independent and international news media illuminated attempts to stifle or propagandize coverage and emphasized Western ideals of a free press that aims to accurately inform citizens while acknowledging the challenging conditions facing Hong Kong journalists. In contrast, the press in the Chinese mainland and a few Hong Kong local pro-China news outlets followed the ruling Communist Party of China’s stance on Hong Kong in their coverage. Emotionally charged narratives highlighted the protestors’ violence against Chinese state-run news agencies and physical attacks on reporters from mainland China. The coverage sought to delegitimize pro-protestor Hong Kong local news media’s double standards in terms of their treatment of news media and reporters from mainland China and accused them of practicing unethical, sensationalized reporting. They also discredited citizen journalists by arguing that “real journalists” have validation: a license from the government. Meanwhile, a US-based Chinese-language newspaper highlighted police violence against the protestors as well as the crackdown on their newspaper in Hong Kong from Chinese authorities. This difference can be attributed to the media systems in which these newspapers operate, as politics and ideology often encroach upon the news-making process (Luther & Zhou, 2005).

English-language coverage of the protests from local and international sources also documented attacks on journalists, emphasizing their role as legitimate practitioners aiming to inform the public but facing barriers from authorities. Narratives often highlighted the ways journalists were attacked and the physical toll it took on them. Coverage also described how journalists were physically distinguished from the public, the size and prestige of their outlets, and their ability to connect with authoritative sources, demonstrating their recognizability in the journalistic space. In some cases, articles situated individuals outside the boundaries of journalistic practice, describing them as students, highlighting their freelancer status, or
connecting them with state-owned media outlets with questionable motives. These discourses privileged independent, objective, and balanced reporting and distinguished professional from amateur journalists (Tong, 2015) to reinforce the value of this approach to journalism and its necessity in a democracy.

These priorities suggested the formation of competing interpretive communities (Zelizer, 1993) in which journalists from state-owned and independent media, and those with local and international audiences, distinguished themselves as legitimate journalists aiming to accurately capture the events in Hong Kong. They adopted different values in doing so, with pro-Beijing media demonizing protestors and emphasizing the need for harmony and social stability and independent media situating these outlets and their narratives as outside the boundaries of legitimate journalism. Meanwhile, independent outlets highlighted the sacrifices of journalists covering the protests, called for official responses, and defended their need to protest for press freedom in the face of influence and pressure by outside actors (Deuze, 2005).

This institutional discourse allowed journalists to publicly negotiate their democratic and societal roles (Hanitzsch & Vos, 2017) and reassert their authority, credibility, legitimacy, and value (Carlson, 2017; Zelizer, 1993). Although attempts to pit journalists against police and other authorities and participation in protests might typically fall outside the bounds of neutral reporting, in the context of a critical incident (Zelizer, 1992), the coverage challenged this norm, reminding readers of the value of news outlets that challenge the narratives presented by state-run media, even when journalists from those media outlets faced attacks.

Ultimately, journalists used coverage of the Hong Kong protests to document the threats to editorial autonomy they face regularly while highlighting their willingness to make these sacrifices in pursuit of accurate reporting. Through sharing detailed accounts of attacks, they created bonds with other journalists and strengthened their shared professional identity. They also privileged the experiences of journalists they deemed the most credible—those working for independent news outlets, identified through press credentials, and seeking to objectively report on the protests—helping to reinforce their authority. They sought to leverage this authority through publishing statements condemning attacks and calling for official responses, which complicated their desire for distanced reporting while potentially creating an environment where independent journalism can thrive.

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3.4

SAVE THE CHILDREN UK’S #BLOGLADESH CAMPAIGN AND THE CHANGE IN HUMANITARIAN REPORTING

Glenda Cooper

In 2010, Save the Children UK ran its #blogladesh campaign, organizing a media trip to Bangladesh to raise awareness of the Millennium Development Goals (MDGs). Despite setting up the event like a conventional press trip, the aid agency rejected taking legacy media journalists in favor of “mummy bloggers” (women who blogged about the minutiae of family life) in order to achieve public awareness. While there, the women blogged, tweeted, and uploaded pictures to Flickr with the #blogladesh hashtag (Cooper, 2011, 2018). The trip ultimately reached 10 million people via Twitter and made mainstream British media outlets such as the ITV lunchtime news and Radio 4’s Today programme. What might have seemed a one-off gimmick proved a critical incident for journalism in the way it disrupted the journalistic field. It galvanized British aid agencies’ and journalists’ previously symbiotic relationship over covering such stories, and it raised questions over control and co-option with outsiders and beneficiaries having the capacity to tell stories.

This chapter looks at #blogladesh and its successors—such as Oxfam GB’s Twitter takeover (when a Syrian refugee from the Zaatari refugee camp took over the agency’s Twitter feed for a day); Christian Aid’s work with On Our Radar, a social media action group in which ordinary people were given SMS phones to report (Halstead and Powell, 2017; Cooper, 2018); and Islamic Relief’s #Cakes4Syria/The Cake Campaign. Drawing on previous work (Cooper, 2011, 2018), it examines how much control aid agencies were prepared to cede to user-generated content creators, and how the use of such content in fact often handed over more control to a professionalized and brand-conscious aid agency.

The incident: Save the Children UK’s #blogladesh campaign

This chapter draws on interviews carried out for a wider piece of research into coverage of humanitarian crises (Cooper 2016, 2018). The data consisted of 100
interviews with aid agency press officers, journalists, and creators of user-generated content used during media coverage of humanitarian disasters. Additional interviews were then conducted. For this chapter, the most relevant of these were the 22 representatives of aid agencies interviewed both for that research, and subsequently. The aid agencies were all members of the Disasters Emergency Committee (DEC), the UK’s umbrella aid organization under which agencies join forces when there is a significant disaster. In general, those interviewed were the most senior member of the press office, or when relevant, the press officer specifically tasked to cover humanitarian emergencies, and, when available, the social media/digital press officer as well.

The background to the #blogladesh campaign was Save the Children UK’s desire to raise awareness for the MDGs summit in New York in September 2010, and to achieve 100,000 signatures for their Press for Change campaign. However, to interest journalists and the public in the substance of 10 UN-agreed goals was going to be a difficult proposition. Save the Children UK had recently appointed Liz Scarff as its first digital media manager and tasked her with finding innovative ways of using social media to promote Save’s profile and campaigns. She attended the Cybermummy blogging conference in London in summer 2010 and believed she had come across as a useful resource for the agency’s demographic.

“Mummy blogs” emerged in the early 21st century, with ordinary women detailing their day-to-day family lives, covering subjects such as weaning, the frustrations of parenthood, concerns over being a “good” or “bad” mother, and humorous incidents that had happened to them. Archetypes of modern motherhood were produced and consumed (Orton-Johnson, 2017); normative understandings about motherhood were contested (Friedman, 2013); and although mummy bloggers often came from privileged backgrounds, they provided a more variegated picture of motherhood than seen in traditional media, featuring mothers from gay and minority ethnic communities (O’Reilly, 2010). But what was particularly important was the emotional resonance that mummy blogging produced:

Personal mommy blogging is marked by direct emotional reciprocity among its participants, creating strong bonds of trust and support that bloggers characterize as meaningful friendship within a community. In practice, most personal mommy blog authors are also committed blog readers (and frequent commenters), and their alternations between these roles create non-hierarchical, tightly woven webs of interconnection marked by serial, mutual, and intimate self-disclosure.

(Morrison, 2011, p. 37)

One of the pressing problems around coverage of humanitarian issues has been engaging the audience. What Moeller (1999) termed “compassion fatigue,” Choulaiariki (2006) called the “anaesthetic effect” of perpetual stories of suffering, and Tavernor (2017) dubbed “transient compassion” all describe the struggle that
aid agencies have had in ensuring that both media outlets and audiences pay attention to the stories that they promote, and take action.

Scarff believed that the mummy bloggers could cut through and provide emotional resonance: “Who could be more powerful to tell stories about children than mothers who have their own hopes and dreams for their own children” (Cooper, 2011, p. 32). However, the approach was not quite as naively “motherhood and apple pie” as that remark might suggest. While their Twitter handles—@mummytips, @porridgebrain, and @nixdminx—might seem homespun, Scarff had carefully selected three mummy bloggers who were already well established online and had been seen as pioneers in the field. The first, Sian To, ran a specialist parenting PR company, “As Clear As PR,” and founded the UK’s first parent blogger conference, Cybermummy, which drew hundreds of bloggers to the annual event; the second, Josie George, had a blog (Sleep is for the Weak) that reached number one on the Tots 100 Index of UK parents’ blogs. Meanwhile the third, Eva Keoghan, had worked for the influential PR consultant Lynne Franks before working as a social media consultant and lifestyle blogger.

Scarff’s idea was to run what amounted to a conventional press trip to Bangladesh—but without using legacy media reporters. The theory was that the mummy bloggers would not be dependent on an editor or media hierarchy to publish at times outside their control: they would be publishing to their audience via blogs, tweets and Flickr (the image-hosting service) to a clearly defined audience.

Scarff said she was clear to the mummy bloggers that while the agency wanted to raise issues around the MDGs to put pressure on the then Deputy Prime Minister Nick Clegg, who was attending the MDG conference, she “didn’t tell them what to write. They could say anything they liked – we gave up control.” (Cooper, 2011, p. 33). The idea that agencies were ceding control of the story to others was a central narrative to this use of bloggers, and subsequent use of bloggers/influencers.

The use of the mummy bloggers managed to catapult a difficult-to-sell story higher up the news agenda. Within the morning of the launch, 40,000 people had been reached, and a full week before the bloggers were due to leave, the #blogladesh hashtag had trended on Twitter. By targeting celebrity supporters of Save the Children and asking them to mention #blogladesh, the hashtag got further traction.

While in Bangladesh, the mummy bloggers tweeted, took part in a webchat on the British Mummy Bloggers site, and blogged for Sky. By the time the three returned on September 7, 2010, 100 blogs had been written on the subject, 10 million reached via Twitter, and the parenting website Mumsnet had invited Josie George and Nick Clegg to a webchat. News outlets picked up on the story and interviews took place on Radio 4’s Today programme, the ITV lunchtime news, BBC 5Live and the World Service. Scarff estimated the success had been because she had seen social media operating as a “niche community” in the way local and regional press had done previously (Cooper, 2011).
Why was #blogladesh a critical incident?

This chapter suggests that #blogladesh challenged the boundaries of reporting humanitarian crises. This challenge was not pre-planned in an obvious way, although it was conceived after aid agencies struggled to achieve media cut-through around long-term humanitarian stories compared to the dramatic, visual crises that had occurred in the mid-2000s, such as the 2004 tsunami and the 2010 Haiti earthquake. The #blogladesh campaign, centered on the MDGs, did not have the media narrative impetus of rapid-onset disasters. Yet the success of the campaign demonstrated that this represented a movement of boundaries for aid agencies and journalists.

Narratives around humanitarian crises have been extensively theorized, often focusing on journalists and audience reaction to such crises (Chouliaraki, 2006, 2012, 2013; Cottle, 2009; Cottle & Cooper, 2015; Franks, 2013; Minear et al., 1996). Recently, there has been more interest in the roles that aid agencies play in the coverage of such disasters and the symbiotic relationship that is often formed in the field between humanitarian actors and journalists. As Ryle (2000) puts it:

There is a high degree of complicity between aid workers and journalists. News reporters draw on aid sources to a greater extent than they would use a single source in other situations … Aid organizations, in their turn, are dependent to an unhealthy extent on journalists for publicity in order to raise money for their programs (p. 89).

Yet the success of the #blogladesh campaign in ensuring Save the Children UK’s response to the MDGs reached the public consciousness by both social media influencers and mainstream media outlets challenged the idea that aid agencies needed to primarily or solely work with journalists to secure coverage for their campaigns or crisis coverage. A succession of trips (listed in the next section) showed a rush by other agencies to try to utilize this new approach to publicizing their causes. Agencies realized, after the success of the #blogladesh trip, that this was a new and interesting way to engage the public, particularly when the public relations bible PR Week (2010) published an approving dissection of the campaign.

The difference was that the bloggers were not trained journalists and did not therefore have to subscribe to traditional journalistic norms of objectivity and distance when reporting on the aid agencies. For example, in the promotional video made by Scarff for the #blogladesh campaign (Fieldcraft Studios, 2012), we see Josie George asking a woman, “What’s the best thing about being a mother?,” while Eva Keoghan seems close to tears as, talking of one of the women she met, she says: “She said her heart hurts, to see a baby so sick. So do ours.” Morrison’s (2011) “webs of interconnection” provided an emotionally affecting experience for those involved and reading, but it was not interrogation of the aid agency work or the MDGs.

The coverage also emphasized the charity blogger over than the charity beneficiary. As Josie George wrote:
It is hard to find the words here. I didn’t take pictures. Just staying upright and breathing in the space of so much … so much horror, and horror it was, was the best I could manage.

*(George, 2010)*

The focus was on a personal experience rather than an analytic presence. Cottle (2000) has argued that while “ordinary voices” have been routinely used on TV news items, they have become what Beck (1992) calls “the voices of the side effects,” symbolizing the human face of a news story. The particular issue with the mummy bloggers’ accounts was that not only were they the potential “voices of the side effects,” it risked the marginalized—the very subject of the story—fading into the background. Chouliarakis (2006) has noted that we live in a society where:

our own private feelings are the measure against which we perceive and evaluate the world and others … While news becomes part of this “culture of intimacy” it implicitly allows us to focus on our own sufferings and disregard those “others” outside our own horizon of care (p. 13).

This certainly seemed the case with the #blogladesh press coverage. A feature article in the *Daily Express* was headlined “Meet the Online Supermums!” (Stretton, 2010). While the 1,100-word article did articulate many of the key messages that Save the Children UK wanted to get across, it was framed in the context of the three “online supermums” anguish at seeing the suffering. The feature writer quoted Josie George as reacting to their first visit to a Save the Children hospital:

It was extremely upsetting but I learned quickly that I had to cope with what I was seeing. I couldn’t just stand there and look horrified … One little girl who had heart failure after developing pneumonia was gasping for air and her father was sobbing. I cried. These children are like my son.

*(George quoted in Stretton, 2010, p. 40)*

Similar quotes were found in a *Sun* article that was an extract from George’s blog, which spoke of her “stomach start[ing] to twist and [her] head pound” (Pearce, 2010, p. 34) and a later *Independent* feature that included Sian To as “a new breed of cybermummy” (Manning, 2011, p. 20).

Journalism has continually been subject to tension between “detached, dispassionate observation” and seeking to “engage feeling” (Jukes, 2017, p. 35). This is not to say that emotion is absent from reporting. Instead, journalists tend to use ritualized forms of storytelling to “infuse” their work with emotion while keeping their own feelings under control—what Wahl-Jorgensen (2013) has called the “outsourcing of emotional labor” (p. 130). In standard journalistic practice, one of the first questions any journalist will ask is, “How do you feel?” As Wahl-Jorgensen (2019) puts it: “News is dependent – for the drama and appeal of its narratives – on explaining the emotions of characters and actors and engaging the emotions of the
audiences” (p. 9). The aid agencies had specifically positioned themselves as pursuing something different from standard journalistic practice by employing alternative voices, yet they found that engaging with such emotion-infused techniques worked.

Wahl-Jorgensen (2015) has talked about how journalists’ reaction to user-generated content has often been to segregate or co-opt such content in order to maintain their authoritative position. In the case of #blogladesh, the journalists chose to focus on the mummybloggers’ story and portray them less as “reporting” on an issue than being a novel form of case study. Yet the mummybloggers’ ability to report in real time, in this overtly subjective way via social media, also influenced the journalists. Two years later, Save the Children UK planned a similar event to raise awareness of the West African food crisis; this time Neal Mann, then Sky News’s digital media editor, recorded his personal journey in a similar vein across Burkina Faso (Cooper, 2018).

Using social media to report beneficiary voices

Following the success of #blogladesh, Save the Children UK ran another trip with YouTubers for the #PassItOn campaign in 2011; Plan UK ran a Blog 4 Girls competition the same year, in which the winner was taken to see Plan’s projects in Ethiopia. World Vision hosted the #shareniger trip with mummy bloggers in 2012 while Tearfund’s See For Yourself initiative involved faith bloggers. The power of using new technology was initially seen as satisfying increasing demands that diverse voices be heard. It was clear, however, that the bloggers—mainly white and middle-class—were not fulfilling this mission. Instead, social media could be used to try to bring diverse voices to the fore.

Aid agencies then began moving beyond the use of bloggers to facilitate beneficiary voices. In such cases, aid agencies went beyond their traditional roles of primary source (Anderson, 1997; Schlesinger, 1990; Schlesinger & Tumber, 1994) or gatekeeper (Beckett, 2009). Instead, they potentially became a type of mediator, using social media and to afford a voice to the previously voiceless.

One of the most significant moments post-#blogladesh was therefore when, on February 1, 2013, the Oxfam GB Twitter feed was handed over to Hasan Hariri, a Syrian refugee at the Za’atari camp in Jordan, for the day (Cooper, 2018). Hariri’s tweets, which included pictures of his newborn baby, Leen, were retweeted by celebrities such as actor Stephen Fry and singer Damon Albarn. Oxfam counted it as a big success. Not only did it repeat the exercise a month later with members of Hasan’s family, but the Guardian then asked Hasan to repeat the exercise several months later for its Syria liveblog day (see Owen, 2013).

The Twitter takeover dovetailed with the strengths of the #blogladesh campaign: the use of personal pictures by Hasan to illustrate his story. Just as George, To, and Keoghan posted personal photos and impressions for #blogladesh, Hariri’s tweets were a mixture of his own life story and pictures of his family (see, e.g., Hariri, 2013).
#Cakes4Syria/The Cake Campaign: The rise of the social media influencer

With the changing focus of social media away from blogging toward networks such as Twitter, Instagram, and Snapchat (Newman et al., 2018), aid agencies started to incorporate “ordinary” or non-agency voices through social media influencers for campaigns that straddled both press office and marketing. Like the bloggers, these were not formal NGO employees, survivors, or beneficiaries, but they were perceived as a step away from the mainstream media. In particular, the case study of #Cakes4Syria (later known as The Cake Campaign) is worth examining.

#Cakes4Syria was the brainchild of a 23–year old trainee solicitor and Islamic Relief volunteer from Bradford, Sibbat e Noor. In 2013 he came up with the idea of encouraging members of the Muslim community to buy £10 chocolate fudge cakes to be delivered to their door during Ramadan. The cakes, which were divided into 14 slices, were then shared with friends and family during the iftar meal, breaking the daily fast. The cakes were provided by another Islamic Relief volunteer, while a third, Abdul Basit Ali, set up a social media campaign with the #Cakes4Syria hashtag, allowing the idea to spread from beyond Bradford to throughout the north of England, raising £25,000 (Islamic Relief, 2013).

The comparison with #blogladesh is interesting. In both, the power of social media influencers was harnessed to raise the profile of a particular humanitarian issue. Islamic Relief, like Save the Children, benefitted from bloggers/influencers who had a strong following (mummy blogreaders; the Muslim community). In both, media coverage followed with a focus on the social media influencers—in the case of The Cake Campaign, the idea of local volunteers coming up with a novel fundraising idea that could be hashtagged and Instagrammed while bringing family and friends together (Bradford Telegraph & Argus, 2014; Griffiths, 2015; Ledger, 2015).

Both campaigns benefitted and exploited wider social phenomena. The rise of the mummy bloggers in 2010, personified by the success of Mumsnet (Pedersen & Smithson, 2013), aided #blogladesh. Similarly, The Cake Campaign coincided with the surprise success of The Great British Bake Off, a television programme dedicated to amateur bakers. The show had become a huge phenomenon, with three–fifths of adults baking at home once a week by 2013, compared to a third in 2011 (Rainey, 2013).

The difference was that Save the Children UK had come up with the idea of #blogladesh, while Islamic Relief co–opted a grassroots campaign to change their narrative around Syria. Instead of focusing on traditional frames of suffering and war, The Cake Campaign also allowed Islamic Relief to reframe their work around community and sharing. In 2014, Islamic Relief co–opted this as a national campaign with Abdul Basit creating a marketing and social media campaign that took it national, raising £300,000 (Islamic Relief, 2015) and reaching outlets such as The Daily Mail, ITV, and BT News.
The following year Islamic Relief employed Abdul Basit Ali as its web and social media editor. By 2018 he was running Snapchat, Instagram, and Twitter sites for the Cake Campaign and recruiting nine food bloggers to help promote it, reaching 250,000 as a result (Interviewee 3, head of communications). As their media and advocacy manager put it:

Not only is it an area of potential for NGOs to engage with supporters in a new and a personal way, it’s also a huge potential negative, because as it becomes the industry standard, if you’re not engaging with those channels of communication, you look like you don’t care about your supporters, you look like you’re not in touch with them. And if we don’t engage with them on their territory, then their support will go elsewhere.

(Interviewee 10, media and advocacy manager)

The success of The Cake Campaign meant that the press office had increasingly targeted Instagrammers before they became popular (for example, the hijabi model Mariah Idrissi) and focused on ImFeed and Emel, the Islamic equivalents of Buzzfeed and Reddit, to attract Islamic Relief supporters.

**Conclusion: Lessons learned from #blogladesh**

Through critical incidents in journalism, as Zelizer (1992) notes, journalists frame the “hows and whys of journalistic practice” (p. 67). These events allow journalists to confront but also assimilate challenges to their authority and negotiate boundaries around what makes journalism and how other actors in the field react. #Blogladesh fulfills this definition of a critical incident because not only journalists but also their traditional source for humanitarian stories were affected by the way new entrants to the journalistic field and key aspects of boundary work came to the fore.

Such challenges often meet with resistance. While, at the time, journalists chose to perceive user-generated content and the use of actors such as mummy bloggers as a novelty, and as case studies rather than citizen journalists, there was long-term impact on all actors as seen by subsequent interventions. The Twitter takeover and The Cake Campaign saw both aid agencies exploring other ways to reach the public with humanitarian stories, while journalists themselves started to adopt the influence of the subjective in humanitarian reporting, as had happened in other areas of journalism.

So the disruption caused to the journalistic field with the introduction of user-generated content and social media networks presented a new challenge not only to journalists, who found their role as bearing witness and breaking news challenged, but also to aid agencies, who continued to take a role in trying to frame the media agenda (Abbott, 2015; Beckett, 2009; Powers, 2015; Wright, 2018). When journalists could get first-hand witness accounts from the field via tweets, blogs, YouTube, and Instagram, the role of the aid agency as symbiotic
 intermediary, however professionalized, was challenged. The desire for “the whiff of authenticity” (Anderson et al., 2015, p. 95) that UGC and social media gave was prized by journalists, and audiences responded positively to such material (Wardle & Williams, 2008; Wahl-Jorgensen et al., 2010).

As revealed in the interviews, aid agencies began an inner reflection about how they could adapt to the use of this new form of communication, just as they had transformed themselves from “the natural culture of modesty” (Ross, 2004, p. 6) in the 1990s. The success of the #blogladesh trip devised by Save the Children UK had several consequences. As mentioned earlier, it challenged the previous symbiotic relationship between aid agencies and reporters in how they ensured humanitarian crises were covered. While aid agencies still saw journalists as the primary focus for communicating their messages, bloggers and later social media influencers were useful new entrants to the field, which meant that legacy media, while still a key conduit for information to opinion-formers and the public, were not the only ones.

Scholars have noted that since the widespread professionalization of aid agencies in the late 1990s, they have often sought to mimic journalistic work to maximize attention for their cause (Fenton, 2010). Waisbord (2011) has preferred to see NGOs’ actions as part of the more widespread professionalization of news-making to become “news shapers” (see also Manheim, 1998). As noted by Wahl-Jorgensen (2015), journalism has co-opted social media and user-generated content, in a time of media fragmentation. But agencies also embraced the idea of co-opting those with a ready-made following pertinent to their target audiences, such as mummy bloggers (Save the Children UK), faith bloggers (Tearfund), and social media users in the UK Muslim community (Islamic Relief). Even if legacy-media journalists could be interested in committing to a humanitarian story abroad, there were still hurdles to overcome, such as the mercy of a changing news agenda and the need for news pegs or case studies. These problems seemed less intense with bloggers, for whom the story could be framed around their personal experience and their personal timelines.

It also allowed aid agencies to claim they were allowing more diverse voices to be heard. There was a commitment to hear from “real” voices and, as CARE International (2013) put it, even “contrary opinions” (p. 2). For many, though, handing over more control to beneficiaries was not seen as practical or even in the best interests of the agency. The use of bloggers was seen as a “safe alternative.”

The bloggers, and later social media influencers, were not beneficiaries, and neither were they full-time journalists. Thus, like other forms of non-mainstream media, they were seen as more “authentic.” Bloggers also tended to view being taken on a trip by an aid agency as a once-in-a-lifetime opportunity for which they felt immensely grateful. They frequently communicated this gratitude to their audience, rather than taking the “critical friend” approach of most journalists. However, the use of social media did allow beneficiary voices to be heard, as seen in the Twitter takeover. While, in the past, journalists and media organizations embraced social media, post #blogladesh, aid agencies were clear that they could
not ignore its potential, however uneasy they might find the idea of unmediated voices.

By engaging with social media, they could co-opt and try to direct the stories that were told, ensuring that different crises were heard. It also made them more outward-looking, in recognizing that grassroots campaigns could be used. The move from #blogladesh—a campaign constructed by a digital media manager in an aid agency head office—to The Cake Campaign, in which an aid agency co-opted a locally inspired initiative, shows how aid agencies have adapted to incorporate social media work.

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3.5

LIVES AND LIVESTREAMING

Negotiating social media boundaries in the Christchurch terror attack in New Zealand

Matthew Chew and Edson C. Tandoc Jr.

“Remember, lads, subscribe to PewDiePie,” the shooter says as he begins his grainy, video game-style livestream on his mobile phone. He enters the mosque and starts sending bullets flying across holy ground. After retrieving a second firearm, he continues his assault on the mosque, not sparing the bodies struck in the previous skirmish. As he drives away from the scene of the crime, he shoots at random pedestrians and even runs over a body as he makes his way to attack another mosque.

The shooting on March 15, 2019 in Christchurch, New Zealand ended 17 minutes after it began. The terrorist managed to livestream the first of his two attacks on Facebook Live, and despite social media platform providers promptly taking down the footage, copies were continuously re-uploaded and re-posted across various platforms on the Internet. Other online users as well as news outlets were confronted with a dilemma: Should they share the video as well?

In journalism studies, critical incidents refer to events that trigger reflection among journalists about their practices and norms. Critical incidents allow journalists to engage in discourse to challenge and set new boundaries of their profession, or reaffirm existing ones (Zelizer, 1992). But as more and more non-traditional journalists take part in journalism, reflections about journalism are also no longer confined to journalists but can also involve users who are producers and distributors of newsworthy content. Through a textual analysis of 1,926 comments from a Reddit thread titled “Don’t Do It. Don’t Share the #Christchurch Footage:” Demand Goes Out for Blackout of Gunman’s Horrific Video, this chapter conceptualizes the Christchurch terror attack as a critical incident that triggered a process of introspection among social media users.

The Christchurch shooting as a critical incident

The onslaught of communication technologies that allow users to upload content on platforms that reach mass audiences has broken down traditional journalists’ monopoly over the production and dissemination of news. Bruns (2008) suggests
that the lines and roles are now blurred; media “consumers” are now “produsers” who are involved in both the production and consumption of content. This has given rise to a “cult of the amateur” (Keen, 2007): a new breed of citizen journalists, bloggers, and creators who are aided by the tools of the trade that were unavailable to audiences of the past. This has led to the public being increasingly involved in the news gatekeeping process (Singer, 2014).

These are also evident in the production and dissemination of live videos. Television news outlets, including round-the-clock cable news networks, have capitalized heavily on live reports, significantly changing the contours of broadcast journalism (Tuggle & Huffman, 2001). But with the breakdown of traditional gatekeeping and the rise of social media, content can now be disseminated through online livestreams by the general public. By opening Facebook, the most downloaded app in the world, and pressing a single button, the terrorist who perpetrated the Christchurch attack bypassed traditional gatekeepers. He livestreamed the deaths of 51 individuals and spurred 1.5 million re-uploads of the video, which sparked a discourse on the users’ roles and boundaries on handling live videos.

The live video format the terrorist used in the Christchurch attack is not an unfamiliar medium, as traditional television broadcasts have been streaming live programming since the 1930s (MacKinnon & Friesen, 1990). This format provides audiences with a sense of immediacy and transports viewers to the time and location where the event is taking place. Today, anyone with a camera and Internet connection can start a livestream and potentially reach a mass audience.

The ability to capture events on video has altered people’s perception of reality. Boorstin (1964) coined the term pseudo-events to refer to artificial realities created for the sole purpose of being reported. Ribbon-cutting ceremonies, protests, and election debates, for example, are created and staged for the main purpose of generating media attention. These pseudo-events served as a means for people in power to secure news media attention to grow their social influence and popularity (Clarke, 2003), while ordinary citizens did not have the same privilege and access (Gans, 1980; Tandoc & Skoric, 2010). Dayan and Katz (1992) also used the term media event, wherein the public participates in a ceremonial ritual by viewing live broadcasts, allowing citizens to feel as though they are part of the narrative. Similar to pseudo-events, media events are pre-programmed, not spontaneous, and synchronously broadcast. These include contests, coronations, and conquests; an event like the Olympic Games, for example, provides the shift from traditional broadcasting schedules to something live and festive, and spurs viewers to be involved in the moment. Audiences take up an active role in the media event’s festivities, inducing a revitalized sense of loyalty toward the larger society and governing authority.

Nossek (2008) argued that terrorist acts are also a type of media event, a shift from the original definition posited by Dayan and Katz, which only encompassed ceremonial pseudo-events such as traditional televised broadcasts (Valaskivi & Sumiala, 2014) and did not take into account negative events like terrorist acts. Media outlets, however, are keen to pick up on terrorist acts due to their inherent
newsworthiness. In addition to being rare, surprising, and intense (Weimann, 1987), they possess a degree of drama and are highly visual, all attributes that suit broadcast television. As a result, these incidents are meticulously pre-planned to attract media attention. To account for these events, Nossek (2008) proposed the news-media-media-event model: When a terror incident occurs, journalists suspend their traditional role as a “watchdog” and refrain from scrutinizing and criticizing the government. The media then proceed with a ritual that rallies alongside the government’s messages of solidarity and resilience, to restore societal norms and deny the terrorists the opportunity to further their agendas using the media (Nossek, 2008). Under this model, the news media play a central role in legitimizing staged events.

With video livestreaming becoming increasingly accessible to the masses, the barriers to public attention have been lowered. Today, an ordinary citizen’s media event can potentially reach audiences around the world without going through the gates of traditional news media outlets. In the Christchurch incident, the gunman was able to stage a violent event and livestream it in real-time on social networking sites. He became the initiator, the media, and the audience all at once. He sought to create visual impact and garner media attention and had social-networking companies scrambling to take down and halt re-uploads of the footage (Dave & Vengatill, 2019).

This chapter focuses on the livestreaming of the Christchurch shooting as a critical incident in journalism that triggered reflections not just among journalists but also among social media users on the practice of livestreaming. At the crux of critical incidents is a moment when journalism professionals discuss their practices and norms, which allows boundaries of their profession to be challenged and set (Zelizer, 1992). Zelizer has suggested that this process is driven by two main features: technology and archetypal figures in journalism. Critical incidents either revolve around a new form of technology that changes news reporting or individuals who use this technology in a manner sparking a debate on boundaries and norms. The discourse around the Christchurch terror attack includes these features, triggered by factors of new technology like livestreaming and an archetypal figure of the terrorist-producer. Terrorist acts have previously been examined as critical incidents, as they challenged ethical media boundaries. The 9/11 attacks in the United States (Parameswaran, 2006), the Boston marathon bombing in the United States (Jenkins & Tandoc, 2017), and the Charlie Hebdo shooting in France (Jenkins & Tandoc, 2019) all confronted journalists with questions about their rules and routines. In this chapter, we will examine how social media users also take part in negotiating the answers to these questions.

User comments as journalistic discourse

Studies have demonstrated how audiences now take part in publicly reflecting about and negotiating the hows and whys of journalism practice, finding a space to publicize their thoughts and feelings online (Antony & Thomas, 2010; Tandoc & Jenkins, 2018). Such reflection among audiences occurs on social media platforms
and online discussion forums, which provide audiences spaces to air their concerns or even challenge traditional news accounts (Papacharissi, 2004). For example, the Christchurch shooting triggered numerous threads on the discussion forum Reddit, a social news and content aggregation website. Over the years, Reddit has evolved from an aggregator to an online community (Singer et al., 2014), where users discuss sensitive issues like mental health (De Choudhury & De, 2014) and niche topics (Duggan & Smith, 2013). Discourse on Reddit about freedom of the press during the Boston bombing has also been studied (Suran & Kilgo, 2017) as well as the anonymity and “trolling” on the platform (Bergström, 2011). This chapter examines comments on Reddit about the Christchurch incident, which provide a glimpse of how social media users made sense of the livestreamed terror attack. By analyzing these comments, this chapter aims to answer the following question: In weighing on the livestreaming of a terror attack, how did commenters on Reddit problematize what constitutes the boundaries of live broadcast journalism?

This chapter is based on a textual analysis of 1,926 comments from a Reddit thread titled “Don’t Do It. Don’t Share the #Christchurch Footage”: Demand Goes Out for Blackout of Gunman’s Horrific Video. The thread started with the original poster sharing an article discouraging people from sharing the video and managed to reach the front page of Reddit. This dataset was chosen due to the depth and meaning that could be culled from the comments, as the issue became widely discussed. Comments and interactions on the original live-video post could no longer be collected due to takedowns from social-networking or sharing sites. Data scraping from the Reddit thread yielded about 7,000 comments between March 15, 2019, when the incident took place, and April 15, 2019. Of these comments, 1,926 upvoted comments were analyzed, providing sufficient data for theoretical saturation. Users upvote a comment when they deem it to have value and react positively toward it. The comments are often of quality, providing meaning-making opportunities, and are not spam or “troll” comments.

Textual analysis was chosen to further understand the material in the context of its communication, allowing researchers to focus on the textual characteristics, semantics and background of the comments while making an educated guess at the likely interpretations of the text (McKee, 2003). Textual analysis has become a favored method for scholars investigating journalism and media content (Fürsich, 2009). The text allows researchers to discern latent meaning in the cultural context, and the prolonged engagement—as Hall (1975) calls it, “the long preliminary soak” (p. 15)—can also identify implicit patterns, assumptions, and the meanings behind the omission of a particular text.

The comments discussing the video were separately coded line-by-line with a constant comparative approach using in-vivo coding. The researchers then utilized descriptive coding to categorize the different links to better understand the themes that emerged. Thematic analysis was used, as it allows one to focus on identifying, systematizing, and analyzing topics; their subtopics; and how they correlate with one another (Kuckartz, 2014).
Negotiating social media dilemmas

Three themes emerged from the analysis. First, the Redditors problematized freedom of expression and censorship. Second, they debated escapism and realism. Finally, they discussed the plausibility of, as well as the responsibility for, regulation.

Freedom vs. censorship

Some Redditors posed a conundrum between freedom of information and press censorship. Most Redditors felt that information in general should be freely accessible and “is an extension of freedom of speech, a fundamental human right recognized in international law.” The livestream video, for some, should not be an exception. Some users also suggested that the dilemma is more about an individual’s freedom of choice, where “no one should (have) decided that for me.” Other Redditors also saw censorship as “sweeping an important incident under the rug,” and a form of “cowardice” that neither lessens the impact of the terror event nor prevents future ones.

This contrasts with the alternative view of press censorship suggested by a small group of Redditors, where some information should be curtailed by traditional journalists, newsrooms, and social media platforms, as to not “normalize terror and promote an evil agenda” and turn the terrorist into a hero in certain “Internet circles in which he resided.” These Redditors expressed concern that the livestream video could “inspire copycat killers, not to mention the fact that secondary trauma is a very real thing.” Some expressed concern that keeping the video available is submitting to what the terrorist wants: “Watching his video is promoting him. He filmed it because he wanted you to watch it, and you did.” Some justified taking down the video to protect people from becoming desensitized to violence, and others said viewers might still suffer from trauma. A Redditor said he “made the mistake to watch the video. my heart was racing, I couldn’t watch it all.” Some Redditors spoke for a ban to prevent further trauma, while others suggested that the “titillating is not worth the pain, misery, and PTSD you’ll inflict on yourself.”

Those opposed to censorship, however, cited the “Streisand effect”, popularized by an incident where singer Barbra Streisand attempted to hide a piece of information but caused psychological reactance instead, which drew more public attention toward it (Jansen & Martin, 2015). Some Redditors shared how the takedown of the video by various platforms spurred them to seek out the video itself, having never heard of the video until mainstream media discussed the ban. They noted the effect along with “curiosity that goes too deep,” and found that banning, censoring, or removing the footage might cause an unwanted rebound.

Realism and escapism

Some debates focused on escapism and realism. A select group felt that censoring the content forms a kind of escapism, the very inability to face hard-hitting facts.
Other comments drew links to dystopian science fiction where media companies keep the truth from the audience, giving a “sterilizing world view” and allowing one to live in a “false world” that would lead to “[George Orwell’s] 1984 … where appearance becomes the reality, resting on a foundation of sand and easily concealed lies.”

Another group also referred to realism or the representation of truth, where “reality can be ugly and we have to deal with it before it gets worse,” seeking to spark compassion and prepare for the worst. They prefer to be “a little scarred than to be ignorant of the brutal side of humanity.” Other users emphasized the importance of remembering such tragedies and empathizing with the victims. This is akin to journalistic norms, where editors and journalists report the truth but also write the news in a compassionate and respectful manner toward the victims (Ward, 2009).

Redditors argued that being grounded in realism can allow one to “learn what an actual terrorist attack looks like” and what the appropriate actions to be taken are. Redditors holding professional jobs in private security suggested that the footage could be used to “see how the shooter moved through the building and how quick the whole thing happened” and could also be a “good teaching tool for law enforcement and security to show how these kinds of events happen.” It was also said to be beneficial to analyze the conditions that made him who he is, where “the healthy reason to watch things like this is to learn about the psychology of the individuals” before extremist sentiments develop. The rationale with this group is to “take whatever it is and use it to educate,” likening it to instructional videos that refer to previous disasters, which could save lives.

Closely sticking to realism can influence political agendas. Redditors criticized media and politicians for being exploitative, utilizing the event to garner moral capital and further electoral support. A specific group of users felt that politicians would use the media event “as a political wedge” and even suggested that politicians will be “twisting the story to fit their political narrative.” However, the news-media-media-event can also be used to create positive political change, like tweaking firearm laws. Within a month of the shooting, New Zealand passed new gun laws banning military-style weapons (Lyons, 2019), and another group of Redditors providing an opposing view suggested that “if the Sandy Hook shooter filmed his actions we would have gun laws with teeth.” This group of users argued that the video should be exposed, as it can change the course of certain political debates and narratives in either direction.

Some Redditors posit that escaping from the truth might cause misinformation to spread. Comparisons were drawn to “Holocaust deniers who say it never happened” and believe incidents were staged. They also cited the impact and perceived realism of the content, where there is “a difference when reading about the Holocaust in books and then seeing old footages of camps being liberated”—footage seemed more real and hence believable. The Christchurch video itself had its own “conspiracists sharing it saying they do not see blood,” and a Redditor shared an experience with a conspiracist:
I just watched the most bizarre women talk about this video. She was telling her subscribers that this is fake and is a video game. Debunking stuff in the video. And saying the shooters face has no detail just like video game characters. She was disrespecting the families that lost loved ones. Denying that people lost their lives. She was pushing her own agenda for no gun control and it being fake.

**Regulatory responsibility**

Finally, the Redditors also discussed who should be responsible for regulating such content and whether regulating the content is even realistic. They pinned the responsibility to the users, the social media platforms, media organizations, and the government.

Users often regarded themselves as the ones responsible for regulating such content, and they should have both the courtesy and discipline to avoid consumption by “ignoring the video and the animal behind it,” and not distributing the violent video content. Comments from the Reddit thread also suggested that users “should not share this stuff.” “Nothing is gained by watching it or sharing it with others except aiding the evil people who did this.” They see themselves as having the power to self-regulate and do the right thing, taking an optimistic view that others would do the same. In contrast, users who are skeptical about self-regulation suggest that leaving it solely to users can create an avenue for divergent individuals to garner terror support and spur on extremist agendas, even fueling copycats.

The incident has also brought about discussions among Redditors calling for tighter regulations on platforms like Facebook:

Can we talk about the Facebook problem? This is far from the first time Facebook has hosted absolutely horrible content on their site. Honestly with Facebook being such a large corporation, it’s time for our lawmakers to put down their foot.

These commenters attributed the regulatory responsibility to the social media platform, and hence, it should be responsible for taking down and moderating the content. But some Redditors recognized little to no feasibility due to the logistical impossibility, as the platforms “can’t oversee every livestream 24/7 … you don’t even hear a siren, so you expect Facebook to react faster to this shit than the actual authorities?”

Some users on the Reddit thread suggested banning livestreaming functions as they permit people to watch horrific acts in real time and “worse yet, cheer the terrorist before going out to buy their own GoPro.” These Redditors suggested that platforms should take up a larger role as they are too lax in their management, moderation, and gatekeeping of content on the social media network.

A group of users also attributed the responsibility to media organizations and sought greater gatekeeping and a partial “blackout media coverage.” They
suggested that reportage on the incident should exclude the shooter’s backstory, name, and pictures while reporting only on the heroes and victims. The users valued the journalists as the fourth estate to educate the public about certain issues, where “someone else can watch this, tell me if there’s anything important I need to know.” Similarly, they valued the professionalism of journalists and the ethical values of privacy and compassion, citing that “good reporters never release information identifying victims until their families have been notified, ‘a hard, professional rule.’” However, they also recognized the “difficulty in balancing breaking news and privacy” where they had a duty to the public while also showing compassion to the victims and their loved ones.

With the rise of digital media, media dollars and ad revenues have been taking the front seat. Some Redditors do not support the idea of media regulating the use of such content, suggesting that this responsibility would also give media outlets the power to capitalize on the video, utilizing part of the livestream to pad their stories. For example, “helmet cam of the shooter’s walk from his car to right before he started shooting, followed by ‘we won’t show you what happens next’ to get more clicks.” The people arguing against media regulation saw “journalists as the arbiters of who should see what as a terrible idea” when they are no longer fully driven by public good and has to balance journalistic integrity with growing their ad revenue. Another Redditor, however, suggested that posting the videos can ostracize advertisers who are averse to being associated with an organization posting such violent content.

On the other hand, some Redditors attributed the responsibility of regulation to the government. They suggested empowering the state with the ability to regulate the content. Their suggested actions include severe censorship of the video content, complete removal of the footage from platforms, and banning users who intentionally circulate the video. They discussed legal deterrence, making it “illegal to possess or share,” and even utilizing legislative means to take down the video to prevent further copycats. Users even wondered if “there are any provision in New Zealand law for seizing the copyright of such videos and then aggressively taking them down off the internet with (Digital Millennium Copyright Act) DMCA notices?” They looked toward legal justification to control the flow of information and protect vulnerable users from emotional trauma. A partial media blackout was also suggested. This included removal of the shooter’s name and “semi-suppressing the manifesto” while only reporting on the relevant information that the public needs to know. The blackout would complement the government by reinforcing messages of national solidarity and calmness in times of terror.

**Lessons from the Christchurch discourse**

The Christchurch terror incident was unprecedented as it was driven by the new technology of livestreaming, featured the archetypal figure of a terrorist-produser, and was also distributed on social media via online users. It checked all the boxes of a critical incident and more, as it thrust users into a discourse about information
dissemination that usually only involved journalists. As the digital livestreaming phenomenon is seldom utilized for terror or circulated on such a global scale, the Christchurch mosque shooting heightened debates on whether violent media should be censored or regulated.

The discourse echoes traditional ethical debates on terrorism reportage, and users suggest that they should be responsible in their content sharing. The discourse allowed users to rethink their role as creators, distributors, and consumers, and come to a collective re-understanding of social media ethical guidelines. The users suggested that they should tell a master narrative that merges with public unanimity, helps in maintaining societal stability, but also tells the truth about the incident. In a media environment where news audiences increasingly take part in news production and distribution, media users are no longer passive viewers and are part of the new journalism industry, where their perspectives toward gatekeeping and critical incidents can play a part in shaping norms and boundaries. As news organizations increasingly monitor public attention and opinion communicated through a multitude of new information technologies, they not only get clues about audience preferences when it comes to news content but also a glimpse into public expectations of how journalism should be changing.

Understanding how non-journalists reflect on critical incidents in journalism is important for two reasons. First, because journalism plays an important role in informing the public, how the public perceives journalistic norms that guide the conduct of journalism is important, as this perception can affect the extent to which the public puts its trust in journalistic institutions. Second, because non-journalists are increasingly taking part in performing journalistic acts, facilitated by their access to what were traditionally understood as mainly journalistic tools, how these non-journalists negotiate the boundaries of acceptable and unacceptable journalistic performances also affects the extent to which they conduct themselves when they themselves perform acts of journalism. The use of livestreaming is an example.

The livestreamed terror attack is an example of what Nossek (2008) termed news-media-media-event. It was an event staged for public attention through the media, yet the framework of a news-media-media-event no longer suffices, as more and more events are being staged not only for the news media but also for social media, where the gatekeepers are not necessarily traditional journalists. Instead, the initiators, media, and audience have all converged into a single user or produser. A social-media-media-event model—which plays by the rules of social media—is suggested. This refers to events staged for the main purpose of garnering attention on social media that also garners the attention of traditional news media in the process, so that the instigator of the event, the social media platform, and the news media that report about the event going viral become complicit in a staged reality entering public consciousness. As more and more people turn to social media not only to build social networks but also to source content for entertainment and information, more and more events are being staged for the social media audience.
The rise of social-media-events requires an update on community norms. For example, due to the novel nature of livestreaming, platform community guidelines are often inadequate in delineating between acceptable and unacceptable uses of livestreaming. The discourse examined in this chapter provides suggestions for future modifications to platform livestreaming guidelines. This is important, as non-media professionals are able to livestream media events without training, rules, or guidance. Social media platforms now have the same amount of clout as traditional media, and the regulations on social media platforms have the same weight as the media regulations put forth by governing authorities to their traditional distribution networks. The incident examined in this chapter has called for greater regulations of livestreaming by platforms and governments, as users alone are unable to unanimously decide whether the violent content should be shared.

This chapter focused on discourse from Reddit, which comes with certain limitations. Users can post comments under the guise of anonymity, and Redditors have often been associated with being more liberal and supportive of freedom of speech. The comments might therefore not be reflective of the population, but this exploration is not about making generalizations. As more and more individuals engage in journalistic acts on social media, taking advantage of innovations in communication technology that provide them instant access to an audience, most of the time without journalistic training or experience, dilemmas and transgressions are bound to happen. Understanding how non-journalists navigate such ethical dilemmas and negotiate the boundaries of acceptable journalistic practice is increasingly important.

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SECTION IV

Consequences of Critical Incidents
4.1

CROSS-BORDER INVESTIGATIVE COLLABORATION ON THE SURVIVING STORIES

The Forbidden Stories

Maria Konow-Lund and Eva-Karin Olsson

Forbidden Stories, a non-profit collaborative platform that publishes the stories and work of journalists who have been threatened, jailed, or killed, was founded on this premise: Enemies of the press may try to stop the messenger, but they can never stop the message. Two of its founders were among the first people to enter the newsroom of Charlie Hebdo after it was attacked on January 7, 2015, when two brothers stormed into the office in Paris and killed a dozen journalists and wounded several more. The attack on Charlie Hebdo triggered expressions of solidarity from many journalists around the world as well as public and private discourses on what the murder meant for journalism as a whole (Jenkins & Tandoc, 2019). It also became the catalyst for the founding of Forbidden Stories.

Forbidden Stories’ first major project was an act of solidarity with Maltese investigative journalist Daphne Caruana Galizia, who was killed by a car bomb in October 2017. The then-newly established platform initiated a project to perpetuate her work using a secure encrypted platform (informant, August 18, 2018). Investigative journalism is generally associated with a lone wolf approach (Alfter, 2019; Carson, 2020; Graves & Konieczna, 2015) and journalists’ signature competitiveness—whether that of a rivalry between individual reporters or the larger struggles among news organizations to safeguard exclusive access to their sources. However, the journalistic organization behind the Panama Papers, the International Consortium of Investigative Journalists (ICIJ), demonstrated how collaboration trumps competition and exclusivity (Hudson, 2017). It won a Pulitzer Prize for Explanatory Journalism in 2017. As Graves and Konieczna (2015) emphasize, the journalist or organization’s ability to be both first and best with a story is considered a professional quality that audiences appreciate, helping to maintain their loyalty. As ICIJ’s Pulitzer Prize for the Panama Papers shows, we have entered an era in which it is possible to mingle exclusivity, competition, and collaboration.
In this chapter, we are interested in transnational cooperation and collaboration. First, it should be noted that while transnational cooperation and collaboration in investigative journalism are expanding rapidly today, this is not a new phenomenon. However, the collaborative work leading up to the Panama Papers investigation is often forgotten, even though academics often talk about cross-border collaboration and its potential (see, e.g., Carson & Farhall, 2018; Konow-Lund, 2019; Konow-Lund et al., 2019; Sambrook, 2018). Likewise, the historical roots of news sharing among journalists and media organizations are also often neglected by scholars (Konow-Lund et al., 2019).

Forbidden Stories and critical incidents

A classic concept which can be applied to understand the Forbidden Stories is that of interpretive communities. Zelizer (1993) points out that journalists form interpretative communities to handle certain situations and investigations, “united through shared discourse and collective interpretations of key public events” (p. 219). The emphasis here is on how shared experiences impact journalistic norms and attitudes in the context of big news events. Horizontal journalistic cooperation is particularly important in terms of the transnational sharing of practices and norms, as well as the creation of a transnational notion of journalism as a profession. Forbidden Stories insists that while the messenger might be killed, the message must not be. Since it was established in 2017, Forbidden Stories has launched cross-border collaborations to continue the work of murdered journalists Daphne Caruina Galliza of Malta and Miroslava Breach of Mexico. These efforts involve professional journalists who work at both legacy media organizations as well as non-profit organizations. The idea of Forbidden Stories is to sustain the very work that got these journalists killed in the first place, and hopefully extend its scope and reach.

We argue that the very fact that journalists are able to come together across borders is a relatively unique act of solidarity and strengthening of a shared profession. The Paris-based Forbidden Stories platform addresses critical incidents by both challenging and negotiating the practice of journalism as we know it. In calling upon investigative journalists to collaborate on the silenced stories of killed, kidnapped, or imprisoned journalists, Forbidden Stories holds powerful individuals and organizations to account through cross-border collaborations. While such investigations start with critical incidents, they then have a ripple effect upon journalistic practice overall by developing “their own standards of action” (Zelizer, 1992, p. 4). We thus find the types of transnational networks we study here crucial to the ways in which journalists understand their roles in this new global professional landscape, a landscape in which journalism as a profession is being renegotiated due to new information technologies challenging the journalistic profession in many ways (Wahl-Jorgensen et al., 2016). We can look at Forbidden Stories as an example of what can emerge from an interpretive community brought together by critical incidents.
This chapter is informed by face-to-face, semi-structured qualitative interviews with the founders of Forbidden Stories, in Paris in 2018. In 2019, we revisited the informants and did another round of interviews, also interviewing the main person behind Forbidden Stories, Laurent Richard. In addition, several informants in the Forbidden Stories network, as well as one board member and one additional investigative journalist were interviewed. Altogether, 10 interviews were completed. The Forbidden Stories is a unique case as it emerged from a direct attack on the press (the Charlie Hebdo event). For the founders of Forbidden Stories, the work of perpetuating the stories and projects of wounded, imprisoned, or murdered journalists is not about fame or money but about doing something meaningful as investigative journalists.

Stake (2005) has previously suggested that a case study is not as much a “methodological choice but a choice of what is to be studied” (p. 443). Yin (2003) has emphasized how case studies come with an ability to ask “how” and “why” questions. (p. 1). In this case study, the aim has been to answer how the Forbidden Stories platform was initiated by journalists in order for them to respond to threats, attempts, or actual silencing by reporters. Established in 2017, the non-profit platform created networks across borders that included independent actors and prominent legacy media houses whose mythological status it made into a form of protection for threatened journalists in unsafe places (Cottle et al., 2016). This goes in particular for vulnerable local journalists.

Collaboration and competition

In order to understand the formation of Forbidden Stories, it is important to study the rise of collaboration and cooperation in journalism. Often, cooperation and coordination are used interchangeably (see, e.g., Alfter, 2018, 2019; Alfter & Candea, 2019; Sambrook, 2018). Here, cooperation and collaboration refer to two different aspects. While collaboration is a shared effort towards a mutual end, cooperation can be understood as a way to pool resources as well as to complement resources (Konow-Lund et al., 2019). Also, while collaboration is often related to how processes and practices are shared, cooperation also deals with strategies for an organization.

Competition within journalism has not only been understood in strict business terms but also as a social and cultural force (Ehrlich, 1995). Journalists live in a reality in which rating figures and rivals are natural components to keep track off. Rituals such as “good journalists want to win” are part of the competitive ethos that drives work and creates the norm on which journalistic work is set (Ehrlich, 1995, p. 198). According to Graves and Konieczna (2015), cooperation has taken place historically amongst media organizations in different historical phases. This is to say that “every era of journalism features forms of competition and cooperation; the professional and economic logic of news in the last century made the former more visible than the latter” (Graves & Konieczna, 2015, p. 5). In addition, cooperation and collaboration serves as ways for practitioners to “repair the field,”
incorporating “self-conscious efforts to respond to the ongoing crisis in journalism – directly, by providing the kinds of public affairs coverage seen to be lacking, and indirectly, through institution-building meant to promote such coverage in the news industry as a whole” (Graves & Konieczna, 2015, p. 3). Field repair can thus be understood as journalists proactively seeking to network themselves across borders in order to self-consciously respond to an ongoing crises or critical story. Forbidden Stories was built by journalists with years of experience as professional documentarians, producers, and reporters, possessing valuable connections and networks in the business. The “repair” and the self-consciousness came with an understanding of this and also an aim to use their professionalism in a transnational setting (Hellmueller & Konow-Lund, 2019). Although investigations come with competition, particularly in commercial media organizations, there has at the same time been a rise in solidarity in investigative reporting. Such solidarity demonstrates “the possibility to enhance virtue in the conduct of public affairs” (Ettema & Glasser, 1998, p. 7).

The much-cited “Arizona Project” was a pioneering example of collaborative journalism. When investigative reporter Don Bolles was killed in Arizona in 1976, it generated a massive response from colleagues and journalists in general: 36 reporters from 28 different media outlets came together not only to sustain the killed reporter’s work but also to demonstrate professional solidarity and the common ground that all journalists share (Baggi, 2011; Konieczna, 2018). The investigative collaboration during the Arizona Project was about finding facts and stories, demonstrating professional solidarity and common ground among otherwise competing journalists. The project served as a major inspiration for the efforts of Forbidden Stories some 40 years later (Forbidden Stories, 2017).

Within the concept of Forbidden Stories, competition is not gone, as there is still an ability for journalists to share the product among themselves (Alfter, 2019). However, as one journalist mentioned, now it is not so much to report objective facts and inform the public, but also to take a stand “to find a higher purpose” (informant, August 15, 2018). In this sense, sharing skills is also about sharing experiences and values.

Critical incidents of the past can serve to inspire journalistic action in the present. When terrorists broke into the premises of the satirical newspaper Charlie Hebdo and killed 12 people and injured 11 others, the first people to enter after the terrorists were journalists from a different newsroom in the same building. Among them was Laurent Richard, who decided to follow the example of the Arizona Project and launch Forbidden Stories to sustain investigations at times when the original journalists working on the story in question have been killed, imprisoned, kidnapped, etc. Forbidden Stories seeks to increase the impact of, or amplify, this disrupted work on multiple platforms with journalists from around the world, thanks to the careful and deliberate organization and coordination of the practice, the effective use of technological affordances, and the shaping of the journalistic product to suit local, national, and global audiences’ needs.
Forbidden Stories aims to create a collaborative working culture sustained by professional solidarity. Such solidarity is propelled by critical incidents that directly threaten journalists in their everyday work; this is therefore distinct from threats to journalists who take the calculated risks of working in disaster or war zones. These threatening incidents have been on the rise thanks to the growth of transnational terrorism (e.g., the Charlie Hebdo attack) and organized crime (e.g., the Daphne Caruana Galizia murder).

How the killing of a reporter brought reporters together

The first story under the auspices of Forbidden Stories was the Daphne Project, a cross-border collaborative investigative project that included the participation of major news organizations. Daphne Caruana Galizia was killed by a car bomb explosion on October 16, 2017, the same year as the secure and encrypted Forbidden Stories platform was launched. The Daphne Project included 45 journalists from 18 outlets around the globe, including The New York Times, The Guardian, Reuters, and major newspapers in France, Germany, and Italy (Allsop, 2018). The goal of the collaboration was to investigate the motives and reasons for killing Daphne Caruana Galizia and make sure that her stories would not be silenced.

Informants frequently referred to the ability of sharing material and demonstrating solidarity to the project and with its members. Solidarity within cross-border projects was seen as especially important, due to a general scarcity of resources, the arrival of new digital tools (Sambrook, 2018), and the complexities of practice. An informant described the journalistic work process behind the Daphne-project:

I mean, the quality of the collaboration was really, really high. There was no confrontation and no real issue in the group. Everyone was sharing. Everyone was trained to split the work, and to work together. I think [the Daphne project] worked well because everyone knew that we were continuing the work of a colleague who had been killed. In this sense, everyone was willing to do their best for the group, for the project, and for, you know, the stories.

(informant, October 19, 2018)

Collaborative journalism, particularly in relation to online collaboration, requires certain criteria in order to work. This is especially the case when it comes to sensitive sharing of information with hackable technology. Working online comes with digital vulnerability. One way of compensating for this is for collaborations to invent and implement rituals where reporters demonstrate a different solidarity than during the heyday of competitive reporting. In this sense, solidarity becomes a rather unique phenomenon.

The founders of the platform aimed to create quality in-depth journalism, which has traditionally been hard to finance; organize professional informants, with the help of digital technology, even across borders; and create cooperative and collaborative ways of structuring projects. This again affects the typification of their
selected stories—in other words, the ability and willingness to create such platforms are preconditions for such stories to emerge. Emerging platforms are closely linked with the original vision for what they are supposed to be. For example, the aim has been to develop into a global platform. At the same time, they need to pragmatically adapt to their resources, where technology is one such important resource. Yet professionalism in terms of the ability to tell a good story is understood as essential in forming the network. Informants who were part of the Daphne Project said that technology was not as important as telling a new and compelling story:

You can’t just say “I’ll just code my way into being a journalist.” No, you have to be a reporter full stop. If you can’t tell a story, if you can just run a few lines of code but you have no experience in journalism, I’m sorry to say you’re not the first person I will hire, unless I really need strictly a coder for some reason.

(informant, August 15, 2018)

Finally, the work of Forbidden Stories reveals how local stories blend with national and global priorities and interests. At Forbidden Stories, the local, national and the global practices of journalism come together through collaboration. Local journalists bring deep contextual knowledge of the place where the story is taking place, whereas the collaborating journalists on the platform strive to extend the story’s relevance both nationally and globally. Forbidden Stories specifically emphasizes topics with global resonance, such as the environment, public health, human rights and corruption (informant, October 19, 2018). One ongoing investigation into how journalists are being killed at the border between Ecuador and Colombia involves the platform’s collaboration with 20 journalists from all over the world (informant, October 19, 2018). This collaboration encompasses local journalists who are experts on their respective regions, national journalists who promote a national perspective, and global organizational partners who assist in the sharing of the story around the world. These three aspects of production—local, national, and global—are intertwined during production and represent an ability to collaborate on all three levels at the same time. One journalist stated the importance of not having a club of Western media to continue the work of journalists who are killed in other parts of the world:

We will work with local journalists and we will work with local partners … because they know the situation there, and the stories. Because it is super important that we inform [people] in these countries.

(informant, October 19, 2018)

If the concept of “global journalism” sounds utopian, it is nevertheless a worthy goal. Thanks to platforms such as Forbidden Stories, the work of local reporters like Daphne Caruana Galizia can be elevated to national and global resonance by
some of the best investigative journalists in the world. One Forbidden Stories informant pointed out:

What we have is an international network of newspapers that will publish their stories in Asia, in Europe, in Africa, in South America—you know, in major media organizations. So, I think it is great to combine the local and the international and thanks to that you can inform different people.

(informant, October 19, 2018)

Local journalists who hold power to account risk threats and retaliation, and that is where Forbidden Stories provides professional security of a sort:

I think the tricky investigations, like the Panama Papers, not because I covered Azerbaijan, and yes, there is a risk, but it’s not for me, it’s for my reporters in Azerbaijan. I was obviously worried for them and we purposely collaborated with reporters from the country, but they didn’t do any of the interviews, they didn’t sign any of the FOI requests, they didn’t communicate using their regular phones. They basically were completely anonymous, and we didn’t speak about them. So even my colleagues in the newsroom didn’t really know who I’m working with.

(informant, July 29, 2018)

This global vision is a fundamental part of the platform. Forbidden Stories does not want to be known as a white, middle-class, Western platform; it wants a global reach (informant, October 19, 2018). Informants described how the platform is being developed step-by-step, and how the next phase of its evolution is an expansion of the network and its collaborations through reaching out to local journalists in Africa, Latin America, and South Asia, among other places.

Technology, in connection with geographic space, plays a crucial role in the creation of the Forbidden Stories platform. Forbidden Stories typically juggles several projects at once, all in different phases. For the Daphne Project, for example, the platform dedicated half of its time to investigations and half to managing the project, ensuring that the collaboration is working well, and collaborators are sharing information as expected. One way of doing so is to conduct, transcribe, and place interviews on an encrypted internal wiki established by Forbidden Stories. In this sense, both collaboration and project management are enabled by the technology that is available through the platform.

Forbidden Stories aims for a global reach, and digital technology makes it possible for practitioners to stay in touch regularly. While initial project meetings are usually face to face, follow-up interactions are virtual and frequent. Technology allows for expansive inquiries: “We managed to retrieve more than 700,000 documents regarding Daphne’s investigation” (informant, August 20, 2018). Collaborators had to categorize and index this material while sifting through 10,000 messages on Daphne’s mobile phone and blog posts dating back to 2008. To do so,
the project collaborators turned to the Organized Crime and Corruption Reporting Project (OCCRP), a non-profit media organization which aims to work across borders and create technology-based solutions for journalist networks. It is operated by the Journalist Development Network, a US-based organization which seeks to improve both journalism and newsroom management around the world (Organized Crime and Corruption Reporting Project, 2007):

OCCRP provided us with a tool called the Aleph\(^1\) to help us encrypt and index all these documents, so every partner can dig into them online at the same time regarding the task they were assigned.

*(informant, August 20, 2018)*

Over the course of all of this communication, the journalists state that safety and risk assessment remain priorities. The Forbidden Stories platform and its contributing journalists rely on the software Signal, an encrypted protocol, in this regard (informant, August 20, 2018). When pressed for details, the informant was reluctant to elaborate on the various ways in which technology makes it possible to communicate with one’s sources. They explained this was due to the need to not reveal too much of the internal communications and not risk safety. When elaborating on the use of Signal, informants pointed out how it has its shortcomings as well. One such shortcoming encountered in the Daphne project is the overwhelming number of messages the journalists received:

When you’re investigating on a collaborative project, it’s a problem when you receive 400 notifications a day. We set up disappearing messages on Signal.\(^2\) It goes from a few minutes to a week, depending on how sensitive the information is.

*(informant, August 20, 2018)*

Due to technology the work load increases immensely: “Being a small newsroom, leaving for a short while on for example on a holiday, even for a week, it can be difficult to catch up to the activity online” (informant, August 20, 2018). One solution to make things more manageable was the platform’s internal Wiki, designed and made by OCCRP. “ICIJ, the organization behind the Panama Papers, did something similar by building their own what studies have referred to as an ‘internal Facebook’” (Baack, 2016; Obermayer & Obermaier, 2016). Forbidden Stories informants emphasize other software programs and apps as well, such as Jitsi, a free open-source video conferencing, secure drop, and safe box resource. One informant explains: “There is always someone from Forbidden Stories accessing our Signal. We have PGP, encrypted emails, and we have Secure Drop.” These resources are safe and relatively inexpensive alternatives for local journalists as well (informant, August 20, 2018).

The use of software and technology creates challenges to journalistic ethics and awareness of how to protect sources. Several informants emphasized that even
encrypted messages do not include the names of sources, which touches upon the importance of protecting sources’ identities. This is partly because the mobile phone is one of the most vulnerable tools reporters use, particularly when it comes to their apps:

The whole idea of Signal is to have a notification on your phone and the phone is the most vulnerable tool you have, like if a robber, even the intelligence services, get your phone, they can easily have access to all the chats. So that’s why we set up this rule from the beginning, never talk about sources.

(informant, August 20, 2018)

Technology and the way collaborations are networked due to technology, the ability to create digital newsroom with collaborative software, leads to the ability of picking new sorts of stories. But as the above quote emphasizes, digital technology also represents new challenges and new dangers. It is when emerging platforms and collaborations come together that journalists will be able to learn by such challenges and find ways to overcome them.

**Lessons from collaborations**

The Forbidden Stories project challenges established professional norms related to competition between news outlets and journalists. Thus, in the wake of rising threats to journalists’ lives in their everyday reporting, professional solidarity manifested in professional collaboration becomes strengthened as a professional norm and practice. The very fact that journalists manage to work across borders in acts of solidarity is key in the development of what it means to be a journalist in the age of almost universal digitization. Drawing upon the history of collaboration across borders, this article demonstrates the range and impact of cross-border investigations today. These networks do not emerge from a vacuum but instead relate to legacy media and draw upon traditional journalists as well.

Journalists are not merely actors reporting the news but human beings who are sometimes part of critical incidents themselves. Reporters too often become the subject as well as the narrator when they are targeted or swept up in whatever they are reporting on. When collaboration overrides rivalry, journalists can pool resources and efforts and make an effective, international impact of the outcome of their investigations.

Successful collaborations rest on three pillars: *horizontal cooperation, technology, and organization*. First, we argue that certain stories are typified as news which fit into cross-border investigative collaboration stories. A central component in news has traditionally been exclusivity and eagerness among journalists to attain unique stories for themselves. While exclusivity has long been valued by journalists, it has been replaced here by sharing and collaboration—that is, we are now witnessing the rise of a new type of exclusivity, an occupational variety which enhances the credibility of journalism for those who practice it. This exclusivity implies that
journalists located in different places can reach out to local sources who can verify facts for those professional peers. It also implies that professional journalists now have each other’s backs all over the world.

Exclusive news comes from collaborative investigations, but the outcome is shared amongst participating individuals and organizations. A central component for the cross-border investigative collaboration is the “Surviving Story,” those that stem from an endangered or killed journalist. Working on a surviving story fuels the solidarity and hence facilitates collaboration across borders, interdisciplinary differences and also in a new manner linking local, national and global in new ways.

Typification of cross-border investigative collaboration stories is made possible by today’s technology and the ability to work across geographical borders. The work of Forbidden Stories reveals that local stories in the public interest which hold those in power to account often resonate with both national and global priorities as well (see also Berglez, 2013). These relationships become ever clearer and more powerful through the use of the Internet, as anticipated by Castells (1996) with his notion of the “power of flow,” through which the masses gradually erode the traditional societal foundations of power. For example, one might look at homelessness from a local perspective but, in asking how it arose in the first place, one could move on to research it as a global phenomenon. That is, by the combination of journalists being able to communicate in new manners due to technology and to have a global outreach with their stories. Consequently, new types of news stories and news production follows. The combination of collaboration between local, national, and global journalists on the same story, particularly between developing countries and the Western world, has increased. When, for example, the killing of journalists Daphne Caruana Galizia in Malta was chosen as a major collaborative investigation, it could not be categorized as either a local, national or global story, but it could be typified as a collaboration between the three levels, happening at more or less the same time.

While digital technology has made such collaboration possible, this chapter also finds that what really motivates collaboration is a new solidarity between journalists as a professional group. We are witnessing an increase of violence against journalists all over the globe in tandem with the use of digital technology by organized criminals and terrorists to disrupt journalists in their work or to hunt them down, the sum of which is making journalists much more vulnerable (Cottle et al., 2016). In this chapter, we focused on a case where the founders and participators used collaboration and solidarity, triggered by a critical incident, as a tool to overcome threats to silence journalists.

Notes

1 Aleph is a tool created by Friedrich Lindenberg, a Knight Fellow at the International Center for Journalists, during his fellowship. It is designed to index large amounts of data (International Center for Journalists, n.d.).
2 To set up disappearing messages on Signal means that messages are to self-destruct after a certain time.

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References


4.2

THE SPIEGEL AFFAIR, 1962

The incident that changed German journalism history and mediatized politics

*Thomas Birkner and Sebastian Mallek*

The history of the press is not the history of a free press. On the contrary, most of the time, the press has been controlled by the powerful, often via censorship (Birkner, 2019a). This is especially true of German journalism. German history in the first half of the 20th century was dominated by the two World Wars, and in the second half—until 1990—by the division into a socialist state in the East and a democratic state in the West.

In this relatively new and young Western democracy, in 1962 the so-called “Spiegel Affair” occurred. In the following, we will argue—from a communication history perspective in general, and a journalism history perspective in particular—for the Spiegel Affair in 1962 as a critical incident (Zelizer, 1992) in modern German journalism history. The incident was triggered by a long and critical feature story about German forces and their ability to protect the country in a confrontation with the armies of the Warsaw Pact in the news magazine *Der Spiegel*. The central thesis of the article was a NATO maneuver called Fallex 62, passing judgment on the failing of the German military in defending against a massive strike by the Soviet Union. German federal armed forces saw military secrecy violated by the journalists. In the aftermath of publication, state police forces occupied the newsrooms of *Der Spiegel* and some editors and the publisher were even jailed. A massive protest by the public and the media finally led to the resignation of defense secretary Franz Josef Strauß, and the release of *Spiegel* publisher Rudolf Augstein and the other editors from prison.

While not strictly leading the journalists to reconsider “the hows and whys of journalistic practice” (Zelizer, 1992, p. 67), the affair historically marks a critical incident for German journalism. It can be regarded as the first massive confrontation between press and politics in the history of the young democracy (Birkner, 2014) and a milestone for press freedom in the country (Pöttker, 2012). Press freedom had been an often claimed but never achieved goal of the entire German
media history, so far. After this critical incident, German journalism revealed a hitherto unknown independence. We approach this watershed moment—the first big confrontation between state authority and mass media in post-World War II Germany—by combining Zelizer’s critical incident approach with the concept of mediatization, which “has become a much-used concept to characterize changes in practices, cultures, and institutions in media-saturated societies, thus denoting transformations of these societies themselves” (Lundby, 2014, p. 3).

Contrary to the understanding of journalism and the media being suppressed by the powerful—an understanding that dominated centuries of German media history (Birkner, 2012a)—mediatization refers to an increasing importance of the media in modern societies in general. Therefore, we consider the concept of mediatization especially fruitful for this critical incident, because the Spiegel Affair has led to fundamental changes in the power relations between free press and state power. So, this critical incident also serves as a watershed moment in the process of the mediatization of politics in German post-World War II history.

Mediatization as a theoretical framework

Hepp (2013) divides mediatization research into a social-constructivist tradition and an institutional tradition. Scholars have classified the social-constructivist tradition as having a wide and open perspective on what constitutes “the media,” including, for example, small media devices such as smartphones and highlighting emergent media technologies. Meanwhile, the institutionalist tradition has a narrower perspective on mass media and the influences of big media institutions (Birkner, 2019b; Deacon & Stanyer, 2014; Neuberger, 2016).

The social-constructivist perspective focuses on the interaction of people and media technology. The aim here is to analyze how social interaction and the increasing number as well as importance of media technologies in the lives of people are interconnected (Hepp & Krotz, 2012; Krotz, 2007a, 2007b). The institutional perspective, on the other hand, focuses on the (at least partial) adaption of other systems (and their actors)—such as politics—to the functioning of the mass media (Hjarvard, 2013; Marcinkowski & Steiner, 2014; Meyen, 2009; Schulz, 2004). This strand of mediatization research was inspired by the work of Altheide and Snow (1979, 1988) on media logic and gained ground with the growing influence of private television in Western societies in the 1980s. Mediatization of politics was then mostly understood as politics being dominated by the media (Meyer, 2002). The underlying idea of the (mass) media exerting some degree of influence on other systems—especially politics—is widely accepted, especially the perception of media influences felt by political actors and their adaption to a perceived media logic (Cohen et al., 2008; Couldry, 2012; Kepplinger, 2002; Marcinkowski, 2015; Marcinkowski & Steiner, 2014).

Following this train of thought, actors in politics gain advantages if they anticipate relevant patterns of journalistic practice and if they are thus able to control their image in the mass media, leading to the acquisition of what Couldry (2003)
dubbed as “media meta-capital,” which might then convert into political capital. Strömbäck (2011) has developed an important model to determine the degree to which politics is mediatized, in which he identifies four dimensions of mediatization:

The first dimension is concerned with the extent to which the media constitute the most important source of information and channel of communication; the second dimension with the media’s independence from other social and political institutions; the third dimension with the degree to which media content is governed by media logic or political logic; and the fourth dimension with political actors and the extent to which they are governed by media logic or political logic.

(Strömbäck, 2011, p. 425)

For each of these dimensions, Strömbäck (2008) also describes historical phases in which the mediatization of politics takes place, which is crucial for the analysis of the Spiegel Affair as a critical incident.

Phase one can be understood as a “prerequisite for the successive phases of mediatization” (Strömbäck, 2008, p. 236). This phase—the beginning of the mediatization of politics—is reached when the news media constitutes the dominant source of information and at the same time becomes the primary channel of communication between a government and the people it governs. Strömbäck notes that this first phase is not just a prerequisite for the subsequent steps in the mediatization-process, but also necessary for the media’s power with regards to influence over their audience. When this phase is reached, political communicators are forced to at least take the media and their influence into consideration when communicating. However, the media are not independent from institutional actors and cannot freely decide how to act. Consequently, settings in which, for example, parties and governments control newspapers fit into this phase.

In the second phase, the media become more independent of political institutions and are consequently governed mostly by their own—i.e., media—logic rather than that of the political system. The media no longer distribute messages unconditionally and start to make own judgements. In this process—and with new-found independence—media logic becomes an important factor for those who aim to influence media content and its impact. Strömbäck (2008) argues that “the second phase of mediatization means that the media have become semi-independent, that they largely control their own content,” and that “political actors and institutions might still have the upper hand, but they cannot control the media or unconditionally use them to further their own interests” (p. 237). While the political system is still more powerful than the media, it has no longer absolute power over the media and how they operate.

In the third phase, the media’s independence has further increased, resulting in the fact that “political and other social actors have to adapt to the media, rather than the other way around” (Strömbäck, 2008, p. 238). The power balance that
was slightly in favor of the political system in phase two has now shifted towards the media, forcing political actors to further adapt to the media’s logic. They need to improve their media-related skills and increasingly consider the media in their decision- and policy-making processes, because “no social actors requiring interaction with the public or influence on public opinion can ignore the media or afford not to adapt to the media logic” (Strömbäck, 2008, p. 238). However, parts of society might still resist this adaptation or be rather reluctant to change and some politicians still think politics should be in control of the media. In the third phase, it can be expected of political actors to “adapt to the media logic, but to do so in such a way so as not to corrupt the political logic more than is deemed necessary” (Strömbäck, 2008, p. 238).

In the fourth and final phase, the influence—or, rather, perceived or anticipated influence—of the media has further increased. Political actors “think about the media not only when campaigning, but also when governing and in the policy-making processes” and have not only adapted to the media logic but internalized it, with media logic becoming a “built-in part of the governing processes” (Strömbäck, 2008, p. 239). Meyer (2002) is clear about the relationship between media and politics: “Colonization in this sense means the almost unconditional surrender of politics – at least in all visible, publicly accessible aspects of communication – to the logic of the media system” (pp. 71–72). He speaks of media logic as the primary driving force in politics with actors potentially unable to even distinguish between political and media logic. The media and their logic are, by this point, inescapable. By “accommodating the wants, needs, and standards of newsworthiness of the media” (Strömbäck, 2008, p. 240), political actors acknowledge the insignificance of their own system’s logic in comparison with the media’s logic. The media in this phase are “as independent from political institutions as any institutions can be from a social systems perspective, where total independence is always impossible” (Strömbäck, 2008, p. 239). Strömbäck (2008) stresses that the “concept of mediatization is an inherently process-oriented concept” (p. 231) and that this process “must not be linear or unidirectional across the four dimensions” (p. 234).

Kepplinger (1999) has argued that the media have forced their prerequisites for success onto politics and that political actors have accepted these and—at least partially—adapted. To be successful in politics, actors have to succumb to the media’s logic and be successful in the media as well (Kepplinger, 1999). This idea of a one-sided and dysfunctional colonization of politics by the media has since then however been refined (Borucki, 2014; Marshall, 2015). The process of mediatization does not always have to be perceived as a negative subjugation. Rather, it can often be a deliberate and active alignment with the media by politicians to try to use them to their advantage in what could be dubbed self-meditatization (Birkner, 2015; Esser & Matthes, 2013; Meyer, 2002; Strömbäck & Esser, 2014).

This chapter promotes a historical perspective on mediatization with the critical incident of the 1962 Spiegel Affair. Rather than only looking at the rising influence
of the media, we also take the often-overlooked (at least in mediatization research) oppression of journalism by state authorities into account. Consequently, we want to leave behind discussions about which of the two systems at which point in German journalism’s history has been dominating the other one but focus more on the idea of a functional balance between politics and the media and the understanding of mediatization as a dynamic process.

The events before the critical incident

As we will argue for the *Spiegel* Affair as the first major confrontation between state authority and mass media in post-WWII-Germany, we have to take a short detour and outline the framework conditions in which the affair takes place. But first, we discuss the events leading up to this point, considering the phases introduced by Strömbäck (2008, 2011).

Even though the German media landscape around the turn from the 19th to the 20th century had been equally as modern as those in France, the United Kingdom, and the United States of America, including in respect to journalism (Birkner, 2012a, 2016), with the outbreak of World War I, censorship and control by the political system of the media system quickly returned. After World War II, the German media system was totally destroyed.

Following Strömbäck’s phases of mediatization, the first half of the 20th century can be seen as the first phase “whenever the mass media in a particular setting constitute the most important source of information and channel of communication between the citizenry and political institutions and actors, such as political parties, governmental agencies, or political interest groups” (Strömbäck, 2008, p. 236). Strömbäck explicitly includes party-controlled newspapers in this setting, while we, looking at German media history, must widen the scope and include state-controlled propaganda as well.

In West Germany, the Allies tried to implement modern, democratic standards for journalism after 1945. The new constitution of the West German federal state from 1949 guaranteed free speech and the freedom of the press in the fifth article:

> Everyone has the right to freely express and disseminate his or her opinion in written, spoken and illustrated terms and to be able to inform himself freely from generally accessible sources. The freedom of the press and the freedom of reporting by radio and film are guaranteed. Censorship does not take place.

*(German Bundestag, 1949)*

Due to decentralization, media laws were under the authority of the regional parliaments of the respective federal states. But there were early attempts of the Federal Government in Bonn to implement a federal press law, for example in 1952. But the reactions in the press had been so negative (Wilke, 2019) that the draft for the law silently disappeared. So, Strömbäck’s (2008) second phase, where “the media have become more independent of governmental or other political parties” and “have
begun to be governed according to the media logic, rather than according to the political logic” (pp. 236–237) was then still awaiting. The next important incident between state and media was the so-called Spiegel Affair in 1962.

Based on literature, documents, and interviews we conducted with former German Chancellor Helmut Schmidt, we will show how the Spiegel Affair inflamed discussions around the role and function of journalism as well as the relationship between politics and journalism in Germany in the 1960s and its impact to this day. With mediatization as the theoretical framework, we look at the implications for the power relations between press and politics.

The Spiegel Affair

The Spiegel Affair itself began on October 8, 1962, with the news magazine Der Spiegel publishing the article “Bedingt abwehrbereit” (limited defensibility) (Spiegel, 1962a). The article was based on information obtained from a government official and shed critical light on the most recent NATO maneuver (Fallex 62) and the concept of a pre-emptive nuclear strike. The maneuver simulated a massive strike against Western Europe by the Warsaw Pact countries. In the years prior, minister of defense Franz Josef Strauß as well as Chancellor Konrad Adenauer had been targets of several critical articles in the magazine. Historians like Christina von Hodenberg (2006) called it a “campaign” (p. 328) while others, like Peter Merseburger (2007), even called it a “crusade” (pp. 224). For example, on April 5, 1961, Strauß graced the cover of Der Spiegel, with an accompanying feature using words like “total annihilation,” “suicidal risk,” “absolute deterrence,” “criminal stupidity,” and “dynamic deterrence” (Spiegel, 1961, p. 14).

Helmut Schmidt, a young yet famous Social Democrat from Hamburg, who would later become the fifth German Chancellor, had known the main author of the story, Conrad Ahlers, since their days together at the Hamburg Socialist German Student Union (SDS). Schmidt is an important and interesting figure in the incident (Birkner, 2012b), as he gained some experience in journalism in post-war Hamburg, mainly for left-wing papers, and understood media routines very well. In early 1962, the year of the Spiegel Affair, he became the political hero of his hometown Hamburg and publicly known in Germany when he managed an enormous flood crisis, where he also demonstrated his knowledge of how to activate coverage by triggering news values such as personalization (Birkner, 2014).

Schmidt can be seen as an example of the self-mediatization of a media-conscious politician (Birkner, 2015). He was a young Social Democrat, a member of the opposition in the German parliament, and a harsh critic of the conservative government and especially of defense secretary Strauß. On April 15, 1961 he wrote a letter to the Spiegel editor in which he urgently warned against Strauß (Birkner, 2014). The issue of the nuclear arming of the Bundeswehr was very important to Schmidt, which is why he wanted a broad debate in the Federal Republic on defense issues. He had published a book on defense strategies and its translation, Defense or Retaliation: A German View (Schmidt, 1962), had “established Schmidt as
an expert on defense policy, with a reputation both abroad as well as with the German public” (Birkner, 2015, p. 459).

It is important to note that Schmidt knew about the article “Bedingt abwehrbereit” before it was printed. The story was written by Conrad Ahlers and co-authored by Hans Schmelz. They contacted Schmidt and he advised them to check carefully whether some parts of the story were subject to secrecy. On the 50th anniversary of the Spiegel Affair in 2012, Schmidt talked about the authors of “Bedingt abwehrbereit.” Ahlers and Schmelz: “Both of them really knew a lot about the military. But I understood, I may say, a little more of it than the boys from Der Spiegel” (Spiegel, 2012, p. 74).

The publication of this article escalated tensions between the government and Der Spiegel. Consequently, the government struck back after its publication. On October 26, 1962, the police arrived at Spiegel publisher Rudolf Augstein’s door, but did not find him there. At the same time, the Spiegel newsroom was occupied by federal officials of the Bonn security group. Der Spiegel premises in Hamburg as well as Bonn were searched extensively. Augstein turned himself in to the authorities the next day, while publishing director Hans Detlev Becker and other editors were also arrested. In the meantime, Conrad Ahlers, the article’s main author, was in Spanish Andalusia, so Strauß secretly called the authorities of the Franco regime and they arrested the journalist. Schmidt immediately wrote a letter to Ahlers and offered his help, and also to help Ahlers’s family. It says a lot about the then quite young politician Helmut Schmidt that he offered personal help to a journalist suspected of treason. Two days later, the imprisoned Ahlers wrote back, thanked Schmidt for the offered help and praised him as one of the few people in Germany who deal with military policy issues seriously outside the Bundeswehr (Birkner, 2014).

Schmidt had been informed by the federal authorities shortly before the action. Schmidt declared his concerns about the actions of the Federal Police in Hamburg and wrote to Federal Minister of the Interior Hermann Höcherl: “The danger of a restriction of press freedom cannot be denied. I feel responsible for the fact that Hamburg officials are not called on to assist with illegal acts” (in Grosser & Seifert, 1966, p. 254). The imprisoned Spiegel employees were gradually released, with Rudolph Augstein being the last one on February 7, 1963, after 103 days of imprisonment. Augstein would be hailed as a hero of free speech (Wehler, 2013). Strauß, however, had to vacate his ministerial chair and did so on November 30, 1962.

The Interior Senator from Hamburg, Helmut Schmidt, had stood on the side of Der Spiegel and the freedom of the press. Der Spiegel reported during the affair: “Instead of controlling Der Spiegel, Hamburg police officers were to investigate whether monitored telephone lines and long-distance calls would be blocked by federal officials” (Spiegel, 1962b). Thus, the federal prosecutor’s office quickly suspected him of aiding and abetting treason. Since there was no treason, an actual prosecution could not and did not begin. However, Schmidt had to wait for the final decision until the beginning of 1967. When we interviewed him about the critical incident of the Spiegel Affair, he said that it is in his view mislabeled as it had not been a Spiegel Affair, but instead a “Strauß Affair” (Schmidt, personal interview, January 6, 2011).
The Spiegel Affair as a critical incident in journalism

In the media history of the Federal Republic of Germany, the so-called Spiegel Affair is of significant importance because it would become the first massive showdown between state power and mass media in the young democracy. Looking at the Spiegel Affair in the context of mediatization, it becomes apparent that it revealed a previously unseen shift in the power dynamic between the political and media systems in Germany. For the first time, there was a balance between these two systems, which we would situate in the middle of the second and the third phases of Strömbäck’s (2008) model. Different media houses and large parts of the public stood united against the state authority. It became apparent that arbitrary abuses of power and aggressive actions against the press would not go unnoticed and would not be accepted in the future (Bösch & Frei, 2006). This also signaled to the journalists that they could now work (more) freely.

The journalistic response to the Spiegel Affair

In the immediate aftermath of the events, German journalists showed support for and solidarity with Der Spiegel and condemned the actions of the state. While the Spiegel employees were imprisoned, journalistic resistance against the government started to form. On November 11, roughly two weeks after the events described, Der Stern publisher and editor-in-chief Henri Nannen wrote that Franz Josef Strauß would no longer be a minister in a consolidated democracy and called Der Spiegel an indispensable democratic entity (Nannen, 1962).

The formerly licensed newspapers, admitted by the Allies after 1945, were from the outset more critical of the government than the newspapers of the old publishers, who had been publishers under the Nazi regime and were excluded from the press market until 1949 (Ellwein et al., 1966). However, according to von Hodenberg (2002), the new journalistic political television-magazines—first Panorama, then Report—emerged as government critics and defenders of press freedom. At their side were different print media like Stern or Quick, while the Bild-Zeitung and the journalists’ associations at first held back. However, there was a broad, almost unanimous solidarization of the mass media with Der Spiegel.

Leo Brawand, appointed as chief-editor for Der Spiegel after Augstein’s imprisonment, boldly proclaimed at press conferences following the detainment of the Spiegel employees that Strauß and Adenauer should be aware that none of their subsidiaries would be spared reporting from now on and that Der Spiegel would continue reporting as if their colleagues were right beside them and not behind bars (Brawand, 1987).

In the auditorium of the University of Hamburg, journalists, lawyers, and politicians discussed the affair in front of almost 2,000 listeners. Some members of the “Gruppe 47”, a group of German writers that met regularly between 1947 and 1967 to read and critique each other’s texts, also found themselves in need of a manifesto in which they defended Augstein against this “act of state arbitrariness” (von Hodenberg, 2006, p. 332).
Der Spiegel received practical support in the media city of Hamburg. As the newsroom remained occupied, the weekly Die Zeit offered working space, typewriters, and desks in the press house on Speersort. As Zeit publisher Gerd Bucerius remembered later, without the support from Die Zeit, the Spiegel editors would have had to work in the staircase (Bucerius, 1976).

It was not just other journalists and media personalities that showed support for Der Spiegel and condemned the government’s actions. There were also public demonstrations that sided with the magazine and its employees. The fact that the public was so strongly on the side of press freedom also had to do with a new generation of journalists who had nothing to do with the old regime, were oriented to the Allies, had come into leadership positions during these years, and now openly supported Der Spiegel and opposed state authority. Hans Gresman, Zeit editor at the time, prophesied at the beginning of the affair in an unnamed editorial: “Spiegel-Affair, state affair. Whatever the outcome, the winner will not be called Franz Josef Strauß” (Zeit, 1962, p. 1).

The impact on journalism

If mediatization is not a linear and ongoing process towards the fourth phase Strömbäck (2008) describes, where politics is colonized by the media in the end, but rather a more dynamic process, we may have found the beginning of the third phase, when “political actors must accept that they can no longer rely on the media to accommodate them” (Strömbäck, 2008, p. 238) and the media’s independence from the political system has increased. Schmidt can be seen as an example of a politician who supports the media and knows how to handle them in his favor.

The Spiegel Affair, on the back of wide-reaching protest and condemnation from parts of the public, especially students and other media houses who criticized the government’s actions as a clear attack on the freedom of the press, can be seen as the beginning of this phase. With Strauß having to vacate his post and Augstein leaving jail—albeit it being after more than three months—the fight for freedom of the press had been successful. In 1966, the German Supreme Court decided that the actions taken by the state had been illegal. It was the first moment in German history, when there was literally a free press:

A free press, not controlled by public authority and not subjected to censorship, is an essential element of the free state; In particular, a free and frequently published political press is indispensable to modern democracy.

(Bundesverfassungsgericht, 1967)

Consequently, this incident impacted journalism at the time insofar as it established not just the official freedom of the press which had been constituted and written into law in 1949, but also a factual and practical freedom of the press. This was a clear signal, not just to the rest of society, but especially to journalists, that the era of dominance of politicians and the political system over them and their work
came to a close and that journalism was becoming more and more independent. This signaled that journalists could now work freely, and that this freedom was not just declared, but that it can also be seen in practice and that abuses of power and the suppression of a free press would no longer be tolerated.

It is, however, wrong to see the Spiegel Affair as ground zero of these developments. Wehler (2013) and Münkel (2013) point out that developments towards critical journalism and a critical public in Germany had already begun with the end of World War II and especially in the 1950s. However, these developments were drastically accelerated and dynamized by the events surrounding the Spiegel Affair. The self-understanding of journalists as not just tools for politicians, but rather as neutral and critical observers, was strengthened, spearheaded by the journalists with Der Spiegel as a symbol of this new kind of press (Münkel, 2013). It can be argued that the changing self-understanding of these journalists was motivated by multiple factors, including a generational shift in multiple editorial offices, but the Spiegel Affair certainly served as a catalyst to these developments.

Moreover, a change in politicians’ behavior towards journalism can be seen not too long after the events of 1962. Willy Brandt, chancellor from 1969 onwards, had also previously worked as a journalist and, in contrast to his predecessors, treated the media as an allied equal rather than an accessory to serve his agenda (Münkel, 2013). Although his experiences in journalism certainly played a role in his rather liberal views towards the role of the press, the events of the Spiegel Affair might have played a role in facilitating a framework in which the media system and the political system could interact on such a level.

While some, Rudolph Augstein included, proclaimed that the effects of the affair subsided quickly, in retrospect the effects were long-lasting. The events, and especially the self-mobilization of students, artists, and the entire media sector of Germany in support of Der Spiegel, strengthened civil courage as well as grassroots democracy (Brawand, 1987).

In times where populism is on the rise and there are tensions between politics/politicians and the media once again, this instance can serve as a reminder that the misuse of state power to silence legitimate journalistic efforts can and will not be tolerated—neither by journalism itself nor by the public. While the Spiegel Affair is a national incident, this reminder is one that rings true not just for Germany, but every free, democratic country around the globe.

References


4.3

FROM DISRUPTIVE POWER TO TRAPPED ENDURANCE

Egypt’s journalistic agency after the Tahrir Revolution

Hanan Badr

Situated within the Arab Uprisings of 2011, the Tahrir Revolution was a rupture in Egypt’s politics. It constituted an exceptional moment in the history of the Middle East and North Africa region by shattering the long-standing stagnation paradigm and introducing dynamism (Harders, 2011). It constituted a critical incident as an act of resistance against entrenched authoritarianism, signaling collective yearning for a new social and political order. The Tahrir Revolution transcended its political and socio-economic demands and transformed into a symbolic moment in which Egyptian citizens overcame fear, expressed hope, and demanded change (Castells, 2015).

The Tahrir Revolution still shapes politics and media in Egypt today. While the disruptive uprising moment was short-lived and power holders have since enhanced their authoritarian leaning (Kneuer & Demmelhuber, 2016), the memory of Tahrir feeds the opposition’s hopes and government’s fears despite its inability to transform Egypt into a democracy (Mamdani, 2011). Borrowing from the concept of the Midan (“Square”) Moment, which refers to a “transformative event with numerous episodes” (Ayata & Harders, 2018, p. 279), this chapter views the Tahrir Revolution as a critical incident in process. This acknowledges the interdependence of aspiring for change and transcending the Tahrir Revolution’s temporal and physical limitations.

Along the temporal line of three critical incident episodes—disruptive power, erratic struggle, and trapped endurance—this chapter explores how the Tahrir Revolution, as a critical incident for Egyptian journalism, triggered ongoing re-negotiation processes rather than an immediate change in journalism. As a critical incident, it triggered discursive contestations around “the hows and whys of journalistic practice” (Zelizer, 1992, p. 67). Critical incidents “function as discursive opportunities for journalists to ensure the well-being of their interpretive community by reconsidering, rearticulating, and reinforcing their boundaries and...
authorities” (Tandoc et al., 2019, p. 676). Emboldened by the toppling of Egypt’s fourth president, Hosni Mubarak, and the dissolution of the constitution in February 2011, Egyptian journalists renegotiated their status and autonomy both as citizens and as professionals across three episodes (see Table 4.3.2).

This chapter is based on 10 semi-structured interviews held from 2012 to 2020 with anonymized direct actors or stakeholders personally involved in each episode (three female, seven male). Participants worked at diverse institutions: Al-Ahram, Journalists’ Syndicate, and MadaMasr (see Table 4.3.1). The interviews were analyzed using a grounded theory approach. This chapter contributes to the dire need for more theorizing from the Global South, not only to expand our understanding of journalistic norms and practices beyond the Global North but to analyze disruptions while challenging normative models of media systems (Rodny-Gumede, 2020). Beyond academic sightseeing (Abaza, 2011), this analysis reconstructs journalism’s discursive agency from within its societal and political interdependencies.

**Journalists’ renegotiation of professional autonomy**

The revolution created discursive spaces that encouraged journalists to renegotiate their professional identities and journalistic practices. Shattering the power structure allowed journalists to demand recognition based on professional quality rather than tradition. Since the mid-2000s, a process of semi-liberalization has enabled gradual change towards more professionalization (Khamis, 2011). “Something was in the air,” as veteran blogger and journalist El-Hamalawy wrote in October 2010. So, when the Tahrir Revolution demanded freedom and dignity, it found fertile ground. Many journalists striving towards professional independence echoed those demands and claimed their freedom (Leihs, 2015). Until mid-2013, debates about professional identity, press freedom reforms, and professionalization dominated the scene (Sakr, 2013). Newly established professional alliances used protests and the media to demand professional independence.

**Table 4.3.1** List of cited interviews

<table>
<thead>
<tr>
<th>Code</th>
<th>Designation</th>
<th>Gender</th>
<th>Interview date</th>
</tr>
</thead>
<tbody>
<tr>
<td>J1</td>
<td>Head of desk</td>
<td>Male</td>
<td>21.10.2017</td>
</tr>
<tr>
<td>J2</td>
<td>Editor, founder of online newspaper</td>
<td>Male</td>
<td>02.11.2018</td>
</tr>
<tr>
<td>J3</td>
<td>Reporter</td>
<td>Female</td>
<td>13.01.2012</td>
</tr>
<tr>
<td>J4</td>
<td>Head of online edition</td>
<td>Male</td>
<td>29.10.2017</td>
</tr>
<tr>
<td>J5</td>
<td>Former editor-in-chief</td>
<td>Male</td>
<td>06.09.2017</td>
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<tr>
<td>J6</td>
<td>Editor-in-chief</td>
<td>Female</td>
<td>04.01.2020</td>
</tr>
<tr>
<td>J7</td>
<td>Editor</td>
<td>Male</td>
<td>22.10.2017</td>
</tr>
<tr>
<td>J8</td>
<td>Former editor-in-chief</td>
<td>Male</td>
<td>25.10.2017</td>
</tr>
<tr>
<td>J9</td>
<td>Reporter</td>
<td>Female</td>
<td>29.01.2012</td>
</tr>
<tr>
<td>J10</td>
<td>Senior editor</td>
<td>Male</td>
<td>10.02.2012</td>
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</tbody>
</table>
The Tahrir Revolution exposed and exaggerated divisions among journalists over their professional practice. The friction between external forces (whether politics or business) and a journalism that tends off instrumentalization has long characterized Egyptian journalism (Badr, 2020). We can delineate Egyptian journalists’ occupational struggle for autonomy by differentiating two types of professionalism: internally driven occupational and externally driven organizational professionalism (Örnebring, 2009). Persistent tensions between these types of professionalism is the result of decades of an entrenched, politically polarized, pluralist journalistic landscape. While Egyptian journalists habitually allow political agendas to dominate the media flow and contents or even practice self-censorship (El-Issawi, 2016; Leihs, 2015), these observations should be contextualized within the high political costs (for institutions and individuals alike) of independent journalism. Further evidence of journalists’ adaptation to organizational professionalism derives from ownership (Hanitzsch & Mellado, 2011) and the pragmatic choice to follow values prevalent in their media organization (Richter, 2011) instead of challenging them.

However, editorial autonomy still reflects the “uneasy state of journalism in a country that oscillates between democratic ambitions and an authoritarian legacy” (Hamada et al., 2019, p. 148). Divisions among journalists not only run across professional priorities but reflect divergent normative and political views, which speaks for unresolved and mixed frames of reference for journalistic professionalism. Role perceptions range from the purely political values of defending Islam and Arabism or sustaining democracy and government support to an increasingly watchdog function (Pintak & Ginses, 2009; Ramaprasad & Hamdy, 2006). Journalists tend to prioritize national security and stability by focusing on constructive journalism (Allam, 2019) or even imposing patriotic sentiments, such as “being Egyptian before being a journalist” (El-Issawi, 2016, p. 47).

The tradition of legal authoritarian control of journalism continued after the Tahrir Revolution, which was followed by swift legal and administrative changes to further constrain journalism. Initially, hurried replacements of editors-in-chief and the creation of new media enterprises reshuffled media personnel. Legalizing authoritarianism transformed the law-making process, allowing the state to restrict freedom of expression while maintaining an image of the rule of law (Hamzawy, 2017).

One critical incident, three episodes of journalistic agency

Viewing the Tahrir Revolution as a process allows for the reconstruction of critical incident episodes as peaks in journalists’ contestations for professional autonomy. During these episodes, journalists used a variety of practices to counter political control (see Table 4.3.2). Immediately after the Tahrir Revolution, Egyptian journalists showed that they were an “active agency for change … through intentionality and purpose” limited by and situated within a complex system of interdependencies (El-Issawi, 2020, p. 14). Even after revolutionary euphoria quietened
down, the Tahrir Revolution lingered as a self-defining moment of rediscovering the professional identity. One anonymous journalist remembered the Tahrir Square as a “utopian collective” that changed his psyche forever (J7).

Reflecting the interplay between journalistic agency, legal frameworks, and power mechanisms, this chapter unpacks the dynamics of Egyptian journalism across three interconnected episodes over eight years. The discussion of each episode investigates how diverse journalistic actors discursively renegotiated the profession towards more autonomy by rearticulating what journalism is and should be. During the disruptive power episode of 2011, newsroom contests in a state-owned newspaper shaped a historic frontpage. The erratic struggle in 2016 illustrated the Syndicate’s efforts towards self-regulation. Finally, the trapped endurance in 2019 showed how an independent digital platform pushed for the freedom to practice journalism.

The disruptive power episode

In 2011, the disruptive power episode pushed intensive contestations inside the Al-Ahram (“The Pyramids”) newsroom to the surface. Empowered by the revolutionary euphoria, oppositional subgroups within the newsroom community pushed the frontpage headline they believed was professionally right. Al-Ahram journalists temporarily put an end to its political dependence and symbolically joined the protesters’ masses in Tahrir (see Figure 4.3.1).

Established in 1875, Al-Ahram had prioritized organizational professional values such as loyalty and state deference over occupational values (J5). However, with 800 journalists, it was difficult to ensure that a coherent set of professional standards prevailed among the whole newsroom. Similar to the divisions in the wider community, Al-Ahram newsroom was “fragmented into subgroups behind the powerful editors, others feverishly supported the revolution, and others were ashamed of not being able to report the truth on what really happened outside, just a few meters from our building” (J1).

Al-Ahram changed its course overnight. The emboldened oppositional camp in the Al-Ahram newsroom led the “resistant self-corrective journalistic practice” (J3), tilting Al-Ahram towards occupational instead of organizational professionalism. On February 12, 2011, Al-Ahram’s frontpage read “The people toppled the regime,” clearly echoing the popular Tahrir chant (Figure 4.3.1). Siding with the people reflected “the natural drive towards freedom, and it made us feel protected by the masses” (J9). The exceptionality of this headline was amplified by the return to an extinct practice; the headline was handwritten by a calligrapher, not computer generated (Shoair, 2013), and placed above the newspaper’s pyramid logo to highlight the “historic significance of this frontpage” (J7).

After its massive loss of credibility and sales during the Tahrir Revolution, Al-Ahram aimed at regaining readers’ trust and respect, clearly pushing the public service dimension. Journalists interpreted the headline as redemptive: “We pushed for what we thought was right. We sought reconciliation with the readers whom we
TABLE 4.3.2 Heuristic pattern of journalistic agency in critical incident episodes

<table>
<thead>
<tr>
<th>Critical Incident Episodes</th>
<th>Disruptive Power</th>
<th>Erratic Struggle</th>
<th>Trapped Endurance</th>
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<td><strong>Episode outcome</strong></td>
<td>Breakthrough</td>
<td>Failure to mobilize</td>
<td>Enduring tensions</td>
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[had] betrayed in the coverage so far” (J3). Another journalist said that protests against Al-Ahram reporters in Tahrir Square were a “personal wake-up call” (J7). In March 2011, due to the journalists’ stirring and corruption charges, the editor-in-chief was replaced, although he later dismissed the events as a “coup, character assassination, and lack of gratitude” (J8).

This incident shows that Al-Ahram’s journalistic community and its subgroups had reassessed and redefined their professional boundaries and adjusted their agency towards championing professional autonomy. The journalists’ response, through the strong frontpage headline and expulsion of the editor-in-chief, demonstrated that they sought to end political dependency and mark a return to loyalty to the
FIGURE 4.3.1 Al-Ahram’s frontpage on February 12, 2012, which reads “The people toppled the regime.”
reader. The overall euphoric phase empowered reformist and oppositional actors, who pursued self-corrective mechanisms—both editorially and institutionally—and shaped the short-lived episode of professional autonomy empowered by the Tahrir Revolution.

**The erratic struggle episode**

Five years after the Tahrir protests had subsided, the second episode in 2016 was characterized by an erratic struggle. The police raid of the Egyptian Journalists’ Syndicate to arrest two digital journalists accused of publishing fake news marked an unprecedented tension between the government and Egypt’s sole journalistic professional association. Dubbed an attack on the “house of freedoms” by one of the two arrested journalists (J2), the Syndicate leadership escalated its rhetoric against the Minister of Interior and demanded a presidential apology. In its legal authoritarian tradition, the government discredited the two journalists as imposters because the restrictive Syndicate bylaws do not accept digital journalists as members. The authorities arrested and prosecuted the Syndicate head and two board members for “illegally harboring criminals” (Amnesty International, 2017).

Amid the divided professional community, the camp promoting professional autonomy mobilized many journalists to solidarize with digital journalists. One editorial choice was the “negative minister,” as print and online newspapers banned publishing pictures of the Minister of Interior, only showing him in negative photos. Young journalists and non-members protested openly. Loyalist and senior journalists initiated family gatherings hosted at Al-Ahram newspaper to restore unity and stability. A journalist organizing those events blamed the Syndicate “for acting unprofessionally and mixing politics with journalism, thus polarizing journalists” (J4). The Syndicate’s reaction was perceived as an unnecessary escalation because it changed its stance from defending autonomy to attacking the state and involving the president (Abdalla, 2016).

The outcome of this erratic struggle was insignificant; journalists’ defiance did not materialize into critical change. The government did not meet the desired demands. The Syndicate could not negotiate the journalists’ immediate release, the Syndicate bylaws did not change, the Minister of Interior was not replaced, and the president did not apologize. Later, the court sentenced the head of the Syndicate to two years’ imprisonment and suspended the ruling on bail (Amnesty International, 2017). As the conflict de-escalated, the 2019 Syndicate elections brought in a new, more regime-lenient head, prioritizing stability. A divided board was unable to push professional autonomy. The government could weaken and even freeze self-regulation efforts using the legal rules to exert its control (J2).

**The trapped endurance episode**

Finally, the 2019 trapped endurance episode shows how alternative journalists framed their repeated encounters with the authorities by adopting an editorial
choice that embraces journalistic passion and enhances professional dedication under unpredictable circumstances (Attalah, 2019). Inspired by Jean Genet’s novel on Palestine/Lebanon in 1982, MadaMasr journalists saw themselves as “prisoners of love” trapped by their passion for their profession.

Established in 2013, MadaMasr (“Scope Egypt”) strives for “independent, progressive journalism” (Lehns, 2015, p. 81). Its journalistic ideals make it an alternative medium, as it represents “a proclaimed and/or (self-)perceived corrective, opposing the overall tendency of public discourse emanating from what is perceived as the dominant mainstream media” (Holt et al., 2019, p. 862). For MadaMasr, the Tahrir Revolution is a process, and journalism is a continuous act of resistance. This episode pushed radical editorial choices of creative resilience: to critically engage and aspire to do journalism “that does not only represent the reality, but to explore possibilities, to redefine what journalism is, and [to] expand its boundaries” (J6).

Essentially, the trapped endurance episode crystallizes the unresolved clash between two logics: journalistic autonomy versus political loyalism. A MadaMasr journalist pointed out that in her encounter with a national security officer, “I explained to him that I am an ordinary journalist who does her job properly and gets both sides of the story. I said that I publish everything under my name and have nothing to hide” (Mamouh, 2019).

MadaMasr journalists use a strict professional code as a shield against unpredictable encounters with authorities. Surviving tight frameworks to “be present as long as we can and bear witness” (J6) proves the committed and trapped endurance within the profession. Cautious codes of journalistic practice, renegotiation processes of what is possible, mobilization of strategic Western allies, and the use of publicity through social media have served as protection so far.

In the latest encounter in November 2019, security forces stormed MadaMasr offices, where the staff was held incommunicado for several hours. Three of them were arrested and briefly detained before being released due to an influential phone call from an unknown authority (Nagy & Al-Azhary, 2019). Repeated state campaigns against MadaMasr staff through raids, arrests, travel bans, and interrogations even triggered a response from the former UN General Secretary Ban Ki-moon himself (Fahim, 2015).

The trapped endurance episode shows the divided reactions within the community: support for Egyptian journalists was limited to the Syndicate’s representatives, whose formal function is to protect media freedom. However, there was also a strong solidarity from international donor governments, such as the EU, France, Germany, USA, and Canada (Nagy & Al-Azhary, 2019). State media showed no solidarity. On the contrary, they delegitimized MadaMasr as a front to practice journalistic espionage to intervene into Egyptian affairs (El-Khayat, 2019).

The editorial precautions have protected the alternative medium so far: “Sticking to the professional parameters is our ultimate protection that delays the attack” (J6). Survival techniques include rigorous factchecking, seeking legal advice, opting for collective authorship, and even omitting carefully researched pieces when deemed
too risky. According to one journalist, “we manipulate the language and search for words to express our ideas in hidden ways without sharp confrontations” (J6).

To accommodate legal authoritarianism, MadaMasr decided to officially legitimize its status under the new media regulation laws to fend off criminalization of their journalistic work and allegations of foreign media assistance and to ensure their journalists’ safety (Attalah, 2019; Bahgat, 2015). However, the government has stalled the process and kept the platform’s legal status ambiguous to use it as a liability in times of conflict (MadaMasr, 2018; Nagy & Al-Azhary, 2019). The outcome of the trapped endurance episode is simply about survival and editorial persistence. Negotiating the journalists’ release through international support has successfully fended off the official pressure for now, and the journalists are confined to enduring the tensions for as long as the alternative medium can survive.

An unresolved struggle

The critical episodes triggered by the Tahrir Revolution demonstrate that the non-journalistic actor, here the political regime, consciously plays the legal game to its benefit. In the disruptive power episode, the Tahrir Revolution, as a critical incident, had such a ferocity that it suspended the political-legal authoritarianism. However, in the erratic struggle episode, the Syndicate’s mobilization to redefine who can be a journalist shattered against the walls of political indifference to journalists’ maximalist demands. A former board member stated, “it is simply the lack of political will” (J10). The over-ambitious push for autonomy and self-regulation threatened to destabilize the journalistic landscape for the rulers altogether. In the trapped endurance episode and during the brief arrest, authorities repeatedly threatened the journalists by declaring that Syndicate membership is the prerequisite for official protection (Attalah, 2019).

The critical incident also exaggerated divisions among journalists over their professional practice. Comparing the state-owned bureaucratic Al-Ahram and the private, progressive, Western-educated MadaMasr newsrooms is significant: Al-Ahram journalists comprise “diverse and scattered subgroups,” but MadaMasr journalists constitute “a single community” (Meltzer & Martik, 2017, p. 219).

The critical incident episodes of disruptive power, erratic struggle, and trapped endurance demonstrate that journalists are engaged in an unresolved struggle to renegotiate occupational and organizational professionalism (Örnebring, 2009). At the core, all three sub-incidents show how Egyptian journalism attempts to uphold its autonomy against political forces from outside the profession. Yet, the outcome for journalistic agency in each episode had fluctuating levels of success in achieving their desired demands and real change for journalism practice.

Critical incidents and journalistic agency

Egyptian journalists were constantly balancing external and internal forces to re-adjust their professional position within the wider political, social, and legal
frameworks. However, when a critical incident dislocated the stagnant stability, in the spirit of the Tahrir Revolution, journalists echoed the core demands of freedom, mainly professional autonomy. The critical incident, understood as a process, renegotiated journalism’s aspirations towards new “hows and whys of journalistic practice” (Zelizer, 1992, p. 67) beyond constrained professionalism. The aftermath of the Tahrir Revolution left a friction of liberalization and closing along the temporal dimension, which gave the critical incident episodes their long-lasting processual character.

The Tahrir Revolution revealed nuanced elements of journalistic agency. In all three episodes, journalists resisted the external non-journalistic force that blocks or bends the desired autonomous professionalization. This echoes the oscillation between authoritarian legacies and professional self-driven values (Hamada et al., 2019). Studies on journalism in authoritarian frameworks agree that weak institutions of professionalization limit journalistic autonomy (El-Issawi, 2020; Lohner et al., 2017). This chapter draws attention to the importance of journalistic discursive agency, beyond reducing it to structural elements or technological enablement. The critical incident strengthened journalists’ resolve to reclaim their professional autonomy. The renegotiation processes materialized into a resourceful range of professional practices that highlight journalism’s distinctive professional features, values, and craftsmanship, including editorial choices, legal actions, protests, and mobilization for support.

A critical incident can be examined as a process where the desired form of occupational professionalism (i.e., editorial independence, expanding journalism, and editorial persistence) can be compared with the degree of discursive renegotiations and actions: whether ambitious or highly ambitious; and whether aimed at a change within the journalistic institution or the whole political framework (see Table 4.3.3). The chosen editorial/discursive agency relates to the outcome of the critical incident episode. For example, the more complex and cautious the journalistic agency, the more they can induce the desired change. Bearing in mind the political cost, prioritizing the desired form of professional autonomy can guide journalistic agency to decide whether to enact the critical change or not.

**The value of unresolved tensions**

Even in polarized landscapes, journalism can benefit from the inner discursive friction within its professional community. Divisions into fragmented subgroups, while usually criticized in the literature, can be acknowledged as a method of pluralizing journalistic actors and thus releasing the professional renegotiation processes from dualistic into multiple worldviews on how journalism should be. Journalistic actors do compete and engage within different types of occupational professionalism. If professionalization is pushed by intrinsic instead of organizational logics, this might be the best workable option to advance journalistic self-reflections and fend off external pressures. To sustain their agency, journalists have confined themselves to cautious and strict professional codes in the trapped
endurance episode. The analogy conveys journalists’ intrinsic motivation (Schapals et al., 2019) and feelings of being confined by their own passion for professional ideals.

What we can learn from a decade of evolving critical incident episodes is that it is inappropriate to view journalistic agency in authoritarian contexts as non-professional, stagnant, or useless. Using such rigid assessments neglects the nuanced agency and (suppressed) transformative dynamics that are unleashed by critical incidents of disruptive power like the Tahrir Revolution. Despite structural, legal, and organizational constraints on journalistic actors and even the use of brute force from outside the professional logic, the desire for autonomy exists in various forms. Even if the journalistic community is divided over the kind of norms and values central to the profession, these episodes show that they valorize parameters from within the journalistic profession. They deviate from the standard definition on what the core of autonomous professional journalism should be: to keep journalism relevant to its readers and society, to retain its credibility, to bear witness and survive, or to self-regulate the credentials necessary to be a journalist. While restrictive frameworks sometimes silence autonomous voices through enforcing marginalization, self-censorship, or even exile, this does not negate the potential for journalistic agency to strengthen autonomy.

Viewing the Tahrir Revolution as a critical incident in a process related to journalistic renegotiations advances journalism studies in systems where journalistic agency is challenged by uncertainties and external control. Instead of applying normative concepts from outside the Global South onto seemingly stagnant authoritarian frameworks, this chapter fosters an understanding of the complexity of journalism’s dynamics in authoritarian media contexts from within. Therefore, looking at journalism in a dialectic and context-sensitive way can benefit journalism studies in non-Western settings. The discursive reconstruction of journalism’s
critical incident episodes shows that acknowledging subtle dynamism conveys a more nuanced look into journalism realities around the globe.

Note

1 This chapter uses the term Tahrir Revolution, despite criticism from political science that this was not technically a revolution. This choice acknowledges that Egyptian media and academic discourses refer to the event as the January Revolution. To make the event recognizable for non-Egyptian readers, I use the term Tahrir Revolution, highlighting the importance of Tahrir square.

References


4.4

AN UNCRITICAL INCIDENT?

Journalism and Indigenous deaths in custody in Australia

David Nolan and Lisa Waller

When a young Aboriginal man went to purchase alcohol from a local hotel in the remote town of Roebourne in Australia’s Pilbara region on September 28, 1983, a barmaid heard one of five off-duty police officers, who had all been drinking heavily, snarl: “We’ll get you, you black cunt”. Situated on the lands of the Ngarluma people, Roebourne was notorious for saturation policing, the strategy of deploying a disproportionate number of police to a “problem” area, making arrests highly probable (Cid, 2019). Witnesses said the young man fought back after one officer swore at him and assaulted him outside the hotel. All five officers then set upon him.

Several Aboriginal onlookers intervened, one of whom was 16-year-old John Pat. A witness saw an officer strike John Pat in the face, knocking him backwards so his head struck the road. Another witness said a second officer kicked Pat in the head as he was lying on the ground. The Yindjibarndi youth was then dragged to the waiting police wagon, kicked in the head once more, and thrown in “like a dead kangaroo” (Grabowsky, 1989, p. 79). On arrival at the police station, the officers dragged Pat and several others from the van to the pathway and systematically beat each of them, witnesses added. When officers checked on the teenager in the juvenile cell about an hour later, he was dead. A subsequent autopsy revealed he had suffered a fractured skull, haemorrhaging and tearing of the brain, a torn aorta, and two broken ribs.

Jan Mayman was the first journalist to cover John Pat’s death. A friend living in Roebourne had told her the story and urged her to investigate, so she flew into town:

It was night time and I went to the local hotel … and a very big, tall, impressive Aboriginal man … led me to a hotel room and he had eight Aboriginal people, all men, and they were lined up sitting on two beds and he
said “tell her.” And they all told me this shocking story of a brawl in the main street of Roebourne.

(in Emery, 2013, para. 16)

Mayman filed the story for the major metropolitan newspaper *The Age*, and it made the front page (Mayman, 1984). At that time, it was rare for stories about injustice against Aboriginal people to get such coverage due to lack of interest from journalists and when Aboriginal people did feature in the news it was usually in relation to crime (Meadows, 2001). However, the paper backed their journalist and the story continued to gain prominence. Mayman went on to win Australian journalism’s highest award—the Gold Walkley—for her investigative report and subsequent coverage about the death of John Pat. Following Mayman’s original report, a coronial inquest was held, and her coverage of the hearings also made page one:

The editor … thought it was an important story … this was evidence from a police sergeant who said in court “when blacks gets angry and get stirred up, they tend to get all greasy, so we have to grab them by the hair.” And I had a photo … one of these men who’d been “all stirred up,” and he actually had two large bald patches where his hair had been pulled out by somebody or another. It was a pretty good picture I must say, and that was on the front page of *The Age* too.

(in Emery, 2013, para. 20)

Following the inquest, the five police officers were charged with manslaughter and found not guilty by an all-white jury. They were all reinstated to duty following the trial. Mayman and other mainstream journalists’ reporting on John Pat’s death and the officers’ acquittal resulted in widespread outrage and sparked the long-term campaign that led to the Royal Commission into Aboriginal Deaths in Custody (RCIADIC) and its ground-breaking report. It began in 1987, four years after John Pat’s death, and investigated the deaths of 99 Indigenous people in custody around the country over a 10-year period. Australian news outlets reported on the hearings extensively.

In May 1991, the Royal Commission’s final, five-volume national report (Johnston, 1991) was tabled in Federal Parliament. The release of this landmark document constitutes a critical incident for Australian journalists: “The RCIADIC remains the most comprehensive investigation ever undertaken into the deep disadvantage experienced by Indigenous people as a result of colonisation” (Marchetti, 2005, p. 125), a claim which arguably still holds true. In some respects, the Royal Commission follows the pattern of a “mediatized public crisis,” whereby an initial shocking incident serves to highlight the distance between what is and what ought to be, and media create narratives that both emphasise this disparity and contribute towards a collective impulsion to overcome it (Alexander & Jacobs 1998, p. 28; see also Cottle, 2004). In this case, John Pat’s violent death presented a
“breach” to the social order, ultimately leading to a public enquiry that promised to represent a moment of “redress” and, ultimately, institutional reform. The RCIADIC did not make any findings of foul play nor did it lead to prosecutions. It did, however, lay bare both the scale of systemic disadvantage experienced by Aboriginal and Torres Strait Islander peoples, and the degree to which institutional failures and neglect contributed to perpetuating this. In this respect, the report constituted a shocking event that highlighted the disparity between Australia’s self-image as a civilized country and the reality of its treatment of First Nations people. The report was, as we show below, performatively narrated as a national crisis in news coverage.

Following its central finding that the primary factor contributing to Indigenous deaths in custody was the massively disproportionate incarceration of Indigenous people, the report made 339 recommendations for institutional reform. It focused on a wide range of institutional practices, particularly relating to the legal and criminal justice systems, policing, social and educational services, as well as land rights. Notably, too, the RCIADIC included media institutions among its targets for reform, which arguably provided a critical moment for news organizations and journalists to reflect upon and transform their norms and practices related to Indigenous reporting.

The Royal Commission and the news media

The news media, the report stated, is one of the principal institutions in society “that stands as a form of collective conscience, challenging and putting other institutions under pressure and often acting as a catalyst for change” (Johnston, 1991). However, while the commission acknowledged the role of investigative journalism in sparking the inquiry, it also positioned news organizations as contributors to the problem of the over-representation of Indigenous people in custody, a consequence of journalism’s contribution to both the social perceptions of Indigenous people and the national policy agenda. Indigenous people, it noted, are routinely presented as a “problem” and, drawing on empirical evidence surrounding news coverage, it noted that:

The most common issues dealt with are, on the one hand, matters of welfare such as health, education, housing and employment. On the other hand are law and order issues, including those related to deaths in custody – the representation, that is, of Aboriginal people as a dissident, disruptive or criminal element.

(Johnston, 1991)

While drawing on textual evidence and emphasizing journalism as part of the problem contributing to both excessive incarceration and mistreatment, the RCIADIC adopted a sociological, rather than merely moralistic, approach to understanding news production. On this basis it recommended structural reforms for the
news industry, including the development of Indigenous reporting guidelines, employment strategies, and journalism awards to promote improvements in Indigenous Affairs reporting. Alongside such practical reforms, the RCIADIC noted that processes of news production rely upon routines of identifying and reporting stories, involving sedimented practices and relationships with other institutions, particularly sources, and the prior existence of “media templates” (Kitzinger, 2000) in reporting on Indigenous people and issues. As its final report noted:

Racial stereotyping and racism in the media is institutional, not individual. That is, it results from news values, editorial policies, from routines of news gathering that are not in themselves racist or consciously prejudicial. It results from the fact that most news stories are already written before an individual journalist is assigned to them, even before the event takes place. A story featuring Aboriginals is simply more likely to be covered, or more likely to survive sub-editorial revision or spiking, if it fits existing definitions of the situation.

(Johnston, 1991)

These observations highlight the customary reliance on non-Indigenous authorities in the construction of news stories (Meadows, 2001). The report also said journalists routinely presented Indigenous protests surrounding deaths in custody as “riots,” a term it showed was strongly over-represented in news coverage of Indigenous people (Johnston, 1991). Such representation, it noted, contributed to a process whereby Indigenous people were criminalized, which Cunneen (2018) has discussed as a discourse of “racialised criminality” that serves to position Indigenous people as a threat, resulting in the adoption of increasingly punitive approaches to policing and sentencing.

The release of RCIADIC confronted Australian journalism with direct criticism of its norms and practices and could have served as an opportunity for a critical reflection. It could, and arguably should, have been a critical incident in Australian journalism. In the analysis below, we draw on the concept of an “uncritical incident” to consider the question of why, in the main, this did not occur.

The RCIADIC as an uncritical incident?

The concept of the critical incident, as defined by Zelizer (1992, 1993), draws on Claude Lévi-Strauss’s (1966) concept of “hot moments,” referring to “phenomena or events through which a society or culture assesses its own significance” (Zelizer, 1993, p. 45). While Zelizer is particularly focused on applying this concept to the culture of journalism and the social practices of informal storytelling that constitute that culture, her analyses of these pivotal incidents tend to center on events and phenomena that also often represent critical moments within a wider public culture: Watergate, McCarthyism, the assassination of US President John F. Kennedy, and the Vietnam War, for example. These are events that contribute to
(mediatized) critical reflection about the culture and its values that also implicate journalism. Journalists themselves are both members of, and influenced by, this wider culture, while practices of journalism also contribute to, and are affected by, the public experience of these phenomena.

The importance of critical incidents centers on how they represent moments at which the boundaries of journalism—the normative identities, values and practices that serve as standards through which the everyday performance of journalism is informed, discussed, and judged within the field—are constituted. Such constitution occurs as particular practices and performances of journalism are praised, criticized and positioned as exemplary cases for the consideration of particular challenges or potential pitfalls confronting journalists, as they collectively engage with the ongoing problem of reflecting on what they should be doing in changing circumstances. While such processes of engagement are collective and ongoing, the particular significance of critical incidents lies in the intensity of critical engagement they provoke, and the way in which these are positioned as pivotal moments in journalistic history.

Zelizer (1993) suggests there are two distinct types of critical incident for journalism: “emulatory” moments, where the role of journalism in a particular event or phenomena is positioned as exemplary; and moments of journalistic failure, which provide opportunities for critical reflection on (and can lead to possible reform of) those particular aspects of journalistic practices that are deemed problematic by journalism’s “interpretive communities.” Such critical reflection may not occur at the time of the incident itself. Indeed, as Zelizer notes in her analysis of coverage of McCarthyism, “few journalists made the event a story about journalism, at least not at the time” (Zelizer, 1993, pp. 230–231). While discourses that are more contemporaneous with the incident, which Zelizer terms the “local mode of interpretation” (p. 224) may thus be underwhelming, such incidents may still be positioned as critical after the fact, through narratives that position them as vitally significant turning points in journalism history. Such historical narration, which Zelizer terms the “durational mode of discourse” (p. 224), may thus retrospectively constitute an incident or phenomena as performing a critical role in shaping journalism’s boundaries, regardless of whether it did so at the time of its original occurrence.

We draw on Zelizer’s framework to analyze the local and durational discourses surrounding the RCIADIC, to consider how far it might be assessed as a critical incident. There are strong reasons this should have occurred: not only was journalism explicitly indicted as contributory to the phenomenon of the excessive incarceration of Indigenous people but, as we discuss below, coverage widely presented the RCIADIC findings as a source of national shame and disgrace. Despite this, a previous study of journalistic practices since the RCIADIC branded it a “case study in ethical failure” (Bacon, 2005, p. 17), arguing that there had been little sustained coverage of the issue itself and that most of the report’s recommendations relating to media had been ignored.
Local discourse: How metropolitan daily newspapers covered the RCIADIC report

In order to understand how journalists responded to the RCIADIC as a critical incident, we examined coverage of the release of its final report in seven broadsheet, metropolitan daily newspapers from around Australia on May 10, 1991. We chose The Australian, The Sydney Morning Herald, The Age, The Courier-Mail, The Advertiser, The West Australian, and The Canberra Times for analysis because of their authoritative, agenda-setting position in the journalistic field and strong, passionate attention to the issue for the duration of the inquiry. Our focus here is to understand how journalists made sense of this critical moment at the time. We were particularly attuned to how they engaged with or reflected upon the RCIADIC findings and recommendations in relation to news media.

All the newspapers embraced the commission’s findings, giving prominence and visual representation of the report, endorsing its appeal to the nation’s collective conscience and providing explicit accounts of the conditions of Indigenous people as oppressive and discriminatory. Every newspaper in the sample carried a story about the RCIADIC report on its front page and included further news reports and commentary. Journalists made sense of the incident through two dominant themes: Australia’s entrenched racism, and the Royal Commission as a watershed moment in race relations and a blueprint for change.

Condemning societal racism, advocating change

Bacon (2005) suggests that the release of the RCIADIC report received strong and supportive media attention, with Sydney’s tabloid newspaper, the Daily Mirror Telegraph, presenting the story with headlines including “Oppression Laid Bare,” “It’s a Disgrace to the Nation,” “Our State of Shame,” and “Cell Conditions Inhuman” (in Bacon, 2005, p. 20). Our findings supported Bacon’s reading, with most media echoing the RCIADIC’s condemnatory tone, and amplifying its charge of institutionalized and societal racism. The Australian, for example, ran an edited version of Commissioner Elliott Johnston’s overview of the report for Parliament the previous day, including the line: “Every turn in the policy of government and the practice of the non-Aboriginal community was postulated on the inferiority of the Aboriginal people” (The Australian, 1991a, p. 2). The newspapers amplified this key finding in unison, with Page 1 headlines including: “Deaths Report Damns Racism” (Easterbrook & Masanauskas, 1991) and “Inquiry Damns Racism” (Washington, 1991).

The newspapers also positioned the report as a vital moment in Australian history, which signalled the need and proposed avenues for transformative action. Editorials and feature articles emphasized the Royal Commission’s demands for a comprehensive overhaul of Indigenous policy and its ringing endorsement of the Government’s reconciliation process. For example, The Australian’s (1991b) editorial titled “Watershed in Black-White Relations” (p. 8) called for major reform
in line with the inquiry’s findings. Under the headline “A Judgment in Black and White,” *The Age* (1991) editorial opined:

The final report … is a powerful document, a demand for justice for all the Aboriginal people of Australia, for the right to share in the fruits of the land stolen from their ancestors, to live full lives and to shape their own destiny. (p. 11)

**Minimising media responsibility: The relative absence of media reflexivity**

Despite these acknowledgments of societal and institutionalized racism as an issue, the positioning of the RCIADIC as a watershed moment for historical change, and the implicit and explicit support given to the report’s findings and recommendations, it is notable that the role of the media is, by comparison, largely absent from local discourse in coverage surrounding the RCIADIC. This is somewhat surprising given the attention paid to media coverage in the report itself. One of its key criticisms of media representations of Indigenous people was that they had few opportunities to put their issues on the public agenda, and were often effectively silenced on issues that affected them. This criticism was part of the commission’s wider finding that Indigenous people “had been relegated to the fringes of society.” It noted that the voice of Aboriginal people was missing from the news: “Aboriginal interests are often ignored, and hence become invisible to the broader community” (Johnston, 1991). The Royal Commission also explicitly adopted the position that the media carried special responsibilities as one of the principal institutions for representing the nation and being a catalyst for change. It not only underlined the agenda setting role of the media but also undertook its own research that showed when it came to reporting deaths in custody, Indigenous people were represented “as dissident, disruptive, or as criminal with an overemphasis on so-called ‘riots’” (Bacon, 2005, p. 22). All the newspapers bar one elected not to write themselves into the coverage, preferring an objective stance from which to condemn racism and intolerance and patrol the boundary lines of society.

*The West Australian* was the only partial exception in our sample. Not only did it feature the most coverage about the RCIADIC report, but it made direct reference to the news media’s role in societal racism, although this was undertaken in a less prominent story towards the back of the edition, on page 33. This was at least in part informed by the direct criticism *The West Australian* had received under the headline “Media, Police Accused of Racial Slant” (Kennedy, 1991, p. 33). The newspaper noted that Western Australia’s media had been criticized by one of the commissioners for highlighting crimes and “giving too much space to police opinion.” It also said that its editor had “admitted to the inquiry that Aborigines were mostly referred to in the paper in relation to crime reporting,” though the next paragraph mitigated this acknowledgement by stating that this was “despite the fact that the paper had an Aboriginal affairs reporter.”
While all the newspapers emphasized “entrenched racism” in Australian society as the underlying cause of appalling Indigenous incarceration rates and deaths in custody, the coverage’s silence demonstrated a lack of reflexivity regarding the media’s specific responsibility. There is no mention in any of the reports of the evidence that Indigenous people were unwilling to use media complaints mechanisms, or the inquiry’s recommended media reforms. The news organizations in our sample did not even pause to reflect on the final observation of the Royal Commission in relation to news, that media coverage of Indigenous issues appeared to have improved during the life of the Commission (Johnston, 1991). While every front page called out entrenched racism, the *West Australian* report on page 33 revealed there were journalists and editors who were not willing to appear before the Royal Commission and subject themselves to scrutiny—a claim that can, again, be read as being offered in mitigation of the admissions made by its own editor to the enquiry.

**Durational Discourse: Exceptional Coverage of Indigenous Deaths in Custody**

Given our findings above, might the RCIADIC report be better viewed as an *uncritical* incident where, despite news media clearly being part of the story, the opportunity for critical reflection and reform was at best missed or at worst deliberately ignored? Rather than presenting this simply as a moral criticism, however, the concept of an uncritical incident might instead refer us to the issue of journalistic boundaries: that is, it might suggest that a failure to address the issue is caused not merely by individual failings or institutional interests, but rather by the very boundaries that serve to govern journalistic practice itself. While the concept of critical incidents focuses on how the boundaries and norms of journalism are discursively produced, reiterated, and occasionally transformed, the concept of an uncritical incident refers us to the blind spots characteristic of those norms and boundaries, problems that are not considered precisely because they lie outside the normative boundaries of journalism. The concept of uncritical incidents allows us to consider how the norms and practices of journalism are implicated in processes of societal racism, consistent with previous work that has focused on the routine application of news values and a reliance on predominantly white individuals and institutions as news sources (Cottle, 2000; van Dijk, 2012). As we discuss below, the journalistic emphasis on conflict and crime combines with the disturbingly disproportionate representation of Indigenous people in a criminal justice system that provides a routine source of news stories. This contributes to a tendency for media to reproduce a societal image of Indigenous people as a problem population, which is understood to influence both police and public perceptions of Indigenous people (Cunneen, 2018). The pattern observed here accords with international studies of the role of news in perpetuating racial inequality (Cottle, 2000; Hall et al., 1978).

In another analysis of a critical incident, Tandoc and Jenkins (2018) draw on the work of Pierre Bourdieu to position critical incidents as moments where a struggle
by agents within the field centres on the normative rules, or doxa, that govern the field itself. Part of the reason that such struggles continually occur, from a Bourdieuan perspective, is that fields of practice are pluralistic, in two senses: First, they are characterized by struggles for different forms of capital, especially economic and cultural capital, where the former refers to money and the latter to forms of peer recognition, prestige, and legitimacy (Benson & Neveu, 2005). Second, because different outlets and practices of journalism tend to be associated more with one or the other forms of capital, it produces different sorts of value dispositions, or habitus, in actors that become habituated to the social norms and practices that are prevalent in different parts of the field. Critical incidents, thus, can become sites of struggle informed by journalistic struggles for capital, and over what practices and identities are culturally valorized, by agents that are disposed to value different things and bring such dispositions to such struggles.

Although Zelizer’s own approach to critical incidents is not directly comparable to Bourdieu’s, it is one that also acknowledges the existence of pluralism within the field and struggles over the boundaries that constitute valorized forms and practices of journalism. In discourse surrounding critical incidents, she suggests, such pluralism tends to emerge more readily in durational discourse—journalistic discourse regarding a critical incident after the fact. It is, she claims, in durational discourse that the tensions that characterize discourse surrounding the boundaries of journalism are aired.

For a consideration of the impact of the RCIADIC report over the longer term, this perspective is particularly useful. Firstly, it suggests that there is scope for events to be constituted as critical incidents at some (unspecified) point in the future, and that such emergence is linked to other dynamics that impact journalism. In short, the constitution of critical incidents is not something that is simply produced by journalism’s “interpretive communities” in a vacuum, but is linked to how these are connected or “indexed” to a “wider networking of forces, interests and capabilities” (Zelizer, 1993, pp. 226–227). Secondly, it also supports a reading that allows for complexity, where a phenomenon may be variably constituted as a critical incident, or not, in different parts of the field of journalism.

This is particularly apt in this case, especially given what appears to be an apparent aporia in Bacon’s (2005) analysis of the media response to the RCIADIC as a “case study in ethical failure.” This diagnosis is based on the justifiable claim that, for the most part, the forms of media practice that were criticized in the RCIADIC report mostly continue. For example, Porter (2015) and Cunneen (2018) have discussed how a focus on criminality and the prevalence of riot framings when Indigenous people respond to incidents of police violence persist, despite the RCIADIC report precisely diagnosing such framings as problematic. More broadly, the continued prevalence of “law and order” framings focused on “racialized criminality” have contributed to substantial increases in incarceration rates. Despite the RCIADIC positioning incarceration as its primary target for reform, by 2018 Indigenous people were 15 times more likely to be in prison than non-Indigenous people and Aboriginal and Torres Strait Islander women were
21.2 times more likely to be behind bars than non-Indigenous women (Australian Law Reform Commission, 2018). A factcheck based on best available international data in 2017 found that a claim made by Indigenous leader Noel Pearson that Indigenous Australians are the “most incarcerated people on planet Earth” was factually correct (Anthony, 2017).

At the same time, Bacon (2005) acknowledges the existence of some outstanding examples of in-depth and investigative reporting on Aboriginal deaths in custody. These include a number of prize-winning stories produced both before and, particularly, since the RCIADIC. In the wake of the RCIADIC, Indigenous deaths in custody remain a totemic issue, though one that is a little closer to resolution. For an interpretive community that still prefers to understand itself as addressing injustice, such stories offer grounds for both hope and celebration. However, these might be viewed as exceptional pieces of journalism in both senses of the word: they are both recognized as works of the highest calibre, and they are not normal products of Indigenous affairs reporting, which research has suggested does predominantly reproduce the forms of reporting that form the object of Bacon’s critique. Journalistic prizes do have the power to help shape journalism practice, both because they stand as exemplars, and position the practices and identities of their producers at the pinnacle of an economy of cultural capital. Willig (2019) has argued journalistic awards “consecrate certain values and thus add symbolic capital to these values in the process.” Concurrently, however, there is a risk that, in celebrating its best exemplars as addressing areas of concern, such awards may too readily congratulate journalism’s performance rather than consider the degree to which the field as a whole performs against the RCIADIC’s recommendations for reform. As Langosa (2015) has suggested, it might be argued that, by definition, what makes some stories exceptional is that they stand as exceptions to everyday practice:

Prize-winning stories … represent the field of journalism as it aspires to be, not necessarily as it is or was on a broad scale … The entries, in that sense, are outliers in the context of everyday news work.

(p. 955)

It is with this tension in mind that we focus here on the durational discourse that has surrounded three exceptional, award-winning pieces of journalism produced since the RCIADIC report.

Jan Mayman’s (1984) and David Marr’s (1985) Walkley-winning works of investigative journalism in the 1980s were recognized for their role in triggering the RCIADIC (Bacon, 2005), and in each decade since there has been a Walkley award-winning work of journalism about Indigenous deaths in custody: Bonita Mason’s (1997) “The Girl in Cell 4,” Chloe Hooper’s (2006) “The Tall Man,” and The Guardian Australia’s data journalism project, “Deaths Inside” (Wahlquist et al., 2018). In the latter case, The Guardian explicitly noted how in developing data points for the investigation and presentation of stories of Indigenous deaths in
In three cases, these are works of investigative journalism that hold the Australian justice system to account for the deaths of individual Aboriginal and Torres Strait Islander people in custody since the RCIADIC.

Zelizer (1993) argues that reporters use durational discourse to generate a continuum of contemporary reportorial work against which they can situate themselves. All of these stories employed the Royal Commission report as a yardstick for measuring how far short Australian authorities have fallen in implementing its recommendations, thereby advancing journalism’s normative role of holding the powerful to account. They investigated how police and prisons deal with Indigenous people who are seriously ill in custody, questionable police investigations of deaths in custody, and the state keeping accurate and up-to-date records of deaths. They followed the style of confronting, social justice-oriented journalism employed by Mayman and Marr to tell the story of deaths in custody decades earlier.

It is also notable that a parallel durational discourse emerged in other institutional sites that serve to arbitrate and confer cultural capital on journalists and journalism. For example, critical journalism and media studies emerged in some Australian universities to critique, challenge, and shift problematic news representations of Indigenous people (see McCallum & Waller, 2017). Following RCIADIC recommendations, the Walkley Awards for journalism established an annual Indigenous reporting prize and Australia’s public broadcaster set up an Indigenous unit that employed Indigenous journalists, created dedicated programming, and diversified the kinds of Indigenous stories and voices on its airwaves. In response to the RCIADIC recommendations, the Federal Government also invested in Indigenous media participation in the 1990s through funding increases for the Indigenous community media sector. Yet almost three decades later, there is evidence that Indigenous interests are still often ignored and that sourcing practices at many major news outlets still exclude Indigenous voices (Waller et al., 2019). Despite the use of the RCIADIC as a critical incident in the construction of ideals of Indigenous reporting, its adoption as a reference point to inform and legitimate outstanding works of journalism, and its continued influences in some areas of the journalistic field, there is a strong sense that its normative influence remains, perhaps paradoxically, exceptional rather than widespread.

**Conclusion**

Our concern in this chapter is not to critique the framework of critical incidents but rather, through application, to consider its relevance to this case. Our findings are notably mixed. In the case of local discourse surrounding the RCIADIC, reporting positioned the release of its final report as both a scandalous indictment on Australian society and as a watershed moment in Indigenous-settler relations. Despite this, coverage largely pushed consideration of journalism’s own implication in the relations that contribute to racial inequality outside the boundaries of
reporting practice. This is perhaps unsurprising, given journalism’s historical reliance on conventions of realism as a mechanism to legitimate media accounts as “objective” reporting, promoting its acceptance as mere report through representational practice that “stresses the product and represses its production” (Hackett, 1984, p. 251). Nevertheless, what is striking in this case was the degree to which this involved a reporting that was selective to the point that it verged on a distortion by omission of an important dimension of the RCIADIC report. It is on this basis that we have used the concept of an uncritical incident to highlight such normative exclusion. In the case of durational discourse, by contrast, there is evidence that in certain fora, and through exceptional stories, the RCIADIC was, to some degree, retrospectively positioned as a critical incident.

However, while the RCIADIC has thus been somewhat influential, particularly through institutions and forms of journalism that tend to be situated as sites of high cultural rather than economic capital, the degree to which these operate as normative influences on the wider field is questionable. Such influence is at best quarantined, and at worst serves as a mechanism through which a wider demand for change merely enables a process of self-congratulation that, while perhaps justifiable in the case of exceptional stories, is manifestly unwarranted in the wider field. In the face of such exceptionalism, we are inclined to conclude that the RCIADIC remains an uncritical incident. This finding does not diminish the value of Zelizer’s framework, but it does serve to reiterate that the discursive constitution of critical incidents does not occur in isolation, but emerges as part of, and is reliant upon, wider processes of institutional and societal struggle and reform.

References


An uncritical incident?


5

CRITICAL INCIDENTS IN JOURNALISM

Conceptualization, characteristics, communities, and consequences

Ryan J. Thomas, Edson C. Tandoc Jr., Oscar Westlund and Joy Jenkins

This book conceptually and empirically advances research into critical incidents in journalism. It has presented a variety of case studies, each focusing on events warranting standing as “critical incidents” in journalism, in addition to one case constituting an uncritical incident and two chapters focused on conceptual contours and methodological considerations. Sensitive to the necessity of diversifying journalism studies and its contextual emphases (see, e.g., Hanitzsch, 2019; Rothenberger et al., 2020; Wahl-Jorgensen & Hanitzsch, 2020), we have spotlighted cases from (or at least originating in) 15 countries or territories (namely, Australia, Brazil, Denmark, Egypt, Germany, Hong Kong, Kenya, Malta, Mexico, New Zealand, Philippines, Rwanda, Switzerland, Syria, and the United Kingdom). Although no single volume can be definitive, we hope the geographic breadth of this work illustrates the relevance of the critical incident concept to the study of journalism across (and, indeed, within) contexts.

The goal of this concluding chapter is to review the richness of this book’s contents to draw seemingly disparate themes and arguments together in service of advancing an agenda for this line of research. First, we focus on critical incidents as a concept and situate it within traditions of inquiry in journalism studies (the disciplinary “home” of the four editors). Second, we identify two main approaches to the study of critical incidents: a discourse-centric approach that emphasizes what journalists say and a consequence-centric approach that emphasizes what journalists do. Third, we identify additional considerations involved in the study of critical incidents, namely the need to account for temporality, contextuality, and the antecedents to critical incidents. Fourth, we identify the central role of the journalism studies researcher in identifying and classifying critical incidents and outline some procedural steps to incorporate. We conclude with some brief ruminations on the continued relevance of critical incidents for journalism and journalism studies.
Situating critical incidents in journalism studies

A critical incident serves, for journalism studies scholars, as a concept that can guide scholarly inquiry. Concepts are “central to theory building and hence central to the theoretical work that is at the heart of the academic enterprise” (Vos, 2018, p. 2). Concepts serve as anchors to help guide scholars as they clarify what exactly is being studied. They “guide the research design and analysis, including points of departure and continuous threads” (Eldridge et al., 2019, p. 398). Thus, in order “to be meaningful, any concept should ideally have precise boundaries, delineating it from other, related concepts. To the extent possible, ambiguities should be avoided” (Salgado & Strömbäck, 2012, p. 154). Scholars have devoted ample attention to advancing definitions of the key concepts that animate discussions in journalism studies, such as dark participation (Quandt, 2018), digital journalism (Duffy & Ang, 2019), engagement (Ferrer-Conill & Tandoc, 2018), fake news (Tandoc et al., 2018), and measurable journalism (Carlson, 2018), to name but a few. The steady supply of resources defining and distinguishing concepts in journalism studies (see, e.g., Franklin et al., 2005; Franklin & Canter, 2019; Örnebring, 2020; Vos & Hanusch, 2019; Zelizer & Allan, 2010) is another indicator of the importance of conceptual clarity.

Defining a concept is easier said than done, however. If concepts are too specific or too elastic, they lose their explanatory power (Vos, 2018). A concept should ultimately point us toward its empirical referent—that is, the “observable phenomena” that make it identifiable (Vos, 2018, p. 9; see also Shoemaker et al., 2004). It is noteworthy that the journalism studies scholarship that applies or invokes the critical incident concept (see, e.g., Feldman, 2007; Gilewicz, 2015; Haas & Steiner, 2002; Jenkins & Tandoc, 2017; McCoy, 2001; Meltzer & Martik, 2017; Parameswaran, 2006; Tandoc & Jenkins, 2018; Tandoc et al., 2019) invariably relies on Zelizer’s (1992a) original definition of “moments by which people air, challenge, and negotiate their own boundaries of practice,” which, for journalists, serve as occasions to reconsider “the hows and whys of journalistic practice” (p. 67). This understanding suggests a remarkable level of conceptual stasis—a consequence, perhaps, of the adaptability of the concept to all manner of contexts, a point also illustrated by Carlson (Chapter 1.2) and D’Angelo (Chapter 1.1) in their chapters. However, such adaptability also poses the risk that a critical incident is whatever an enterprising scholar wants it to be; simply identify an instance of journalistic debate and voilà: a critical incident! At the same time, if conceptual contours become too narrow, they stymie that concept’s utility and explanatory power, rendering it inadaptable.

Concepts are but one aspect of the research enterprise. The focus of this volume has been on journalism studies as a field of inquiry. The growth of journalism studies’ “institutional footprint” (Carlson et al., 2018, p. 8) through an ever-expanding portfolio of journals, conferences, and divisions of academic associations has been well-documented (see, e.g., Ahva & Steensen, 2020; Carlson et al., 2018; Wahl-Jorgensen & Hanitzsch, 2020; Zelizer, 2004), and our intent is not to regurgitate that history here. Rather, we want to draw attention to the intellectual
currents within journalism studies and how traditions of inquiry “specify and constrain both the appropriate objects of study and the shape of legitimate knowledge production about these objects” (Carlson et al., 2018, p. 6).

Journalism studies is notable for its theoretical and methodological eclecticism (Ahva & Steensen, 2020; Steensen & Westlund, 2020; Wahl-Jorgensen & Hanitzsch, 2020; Zelizer, 2004), indicative of its members’ magpie-like tendency to borrow liberally from other disciplines. One effort to make sense of the disciplinary influences on journalism studies is Zelizer’s (2004) Taking Journalism Seriously, which identifies five “fields of inquiry” (p. 8) that have shaped how journalism has been theorized: sociology, history, language studies, political science, and cultural studies. Each of these “illustrates premises central to a given disciplinary perspective” (p. 9), influencing how scholars conceptualize critical incidents in journalism. Three particular traditions are worthy of mention here. Scholars concerned with changing newsroom norms and routines and their antecedents will likely be drawn to the sociological tradition (Westlund & Ekström, 2020). Scholars concerned with processes of change, matters of historical explanation, and cause-and-effect over the longue durée will likely find a home in the historical tradition (Vos, 2013). And scholars interested in “journalism as a culture created and recreated [in discourse] by journalists as interpretive communities” (Wahl-Jorgensen & Hanitzsch, 2020, p. 7) will find the commitments and tools of the cultural tradition helpful. The chapters in this book are illustrative of the varied approaches to the study of critical incidents, displaying diversity in methodological approach and analytical focus.

**Defining critical incidents: Two approaches**

What, exactly, do we mean when we refer to something as a critical incident? The Merriam-Webster Dictionary defines the noun incident as “an occurrence of an action or situation that is a separate unit of experience,” “an accompanying minor occurrence or condition,” and “an action likely to lead to grave consequences.” Simply, an incident is something that happens. It is substantially modified by the adjective critical, elevating an action, situation, occurrence, or condition into something of greater import. The Merriam-Webster Dictionary defines the adjective critical as “exercising or involving careful judgment or judicious evaluation” or “of, relating to, or being a turning point or [particularly] important juncture.” These two definitions are quite different. The former pertains to criticism (a noun) and critique (a verb). It emphasizes evaluation and judgment. In this regard, it is discourse centric. The latter emphasizes significance and importance. In this regard, it is consequence centric. These two approaches animate scholarship about critical incidents and provide a useful window into discussing underlying conceptual tensions and emphases.

**The discourse-centric approach**

The discourse-centric approach focuses on “the ways journalists and other social actors negotiate the meaning, legitimacy, and boundaries of journalism through
professional and public discourse” (Wahl-Jorgensen & Hanitzsch, 2020, p. 7). The evidence that an incident warrants standing as a critical incident lies in the sufficiently intense discourse it generated. This approach is the dominant tendency in critical incident research, sharing as it does a conceptual heritage with the parallel concept of interpretive communities in the work of Zelizer (1992a, 1992b, 1993, 2010). The interpretive community framework emphasizes the discursive glue that binds journalists “as a group united through its collective interpretations” who use “channels like news coverage, informal talks, professional and trade reviews, professional meetings, autobiographies and memoirs, interviews on talk shows, and media retrospectives” to “create a community that reflects what matters to them in the making of news” (Zelizer, 2010, p. 182). For Berkowitz (2019), “journalists represent an interpretive community that lives and acts within shared rules and norms, a professional culture that produces common narratives and consensual meanings” (p. 1). Communities are abstractions; they are “imagined,” to use Anderson’s (1983) famous formulation, finding meaning and expression in a shared discursive repertoire. Thus, “a community is actively constructed by its members and those members derive an identity from this construction” (Carpentier et al., 2003, p. 54). An interpretive community finds expression in metajournalistic discourse, which refers to “public expressions evaluating news texts, the practices that produce them, or the conditions of their reception” (Carlson, 2016b, p. 350). This understanding is salient to critical incident research because it calls our attention to the community doing the interpretive work. Such interpretive communities can be internal or external to journalism.

Internal interpretive communities

As the scale of a geographic community grows larger—from the street to the nation—it becomes more heterogeneous and complex and consequently more “imagined.” The largest communal layer, then, is the conglomeration of multiple intersecting communities (from meso-level indicators like states or counties to micro-level indicators like cities and towns to yet more discrete indicators like suburbs and streets). The same is true of interpretive communities, where the ties that bind them grow more diffuse as they grow in scale. The adjective “interpretive” modifies the noun “community” insomuch as it emphasizes something the community is doing—namely, it is interpreting. The community is thus linked by its meaning-making capacity. Journalism is said to be an interpretive community “united through its shared discourse and collective interpretations of key public events” (Zelizer, 1993, p. 219). However, as Carlson (Chapter 1.2) notes in his chapter, the extent to which a community can indeed be “united” and its discourses are “shared” can vary.

Prior research shows that discourses about journalism can be activated by ethical crises, from plagiarism (Hindman, 2005) to phone hacking (Thomas & Finneman, 2014) to outing (Tandoc & Jenkins, 2018). This body of work, often drawing on theories of paradigm repair and boundary work, illustrates this dimension of being
“critical.” In this volume, we can look to the chapter by Hartley, Bendix Wittchen, and Blach-Ørsten (Chapter 2.1) on “peeling” practices in Danish media, which illustrates the discursive strategies deployed by journalists in debating and delineating their norms, ethical stances, and boundaries. The chapter by Grohmann, Moura de Oliveira, and Osorio (Chapter 2.7) describes the fallout from the Escola Base case in Brazil, in which leading TV news broadcasters and newspapers, driven by “the logic of the scoop,” were quick to portray school leaders as guilty of a heinous crime, an event that became known as one of Brazilian media’s most significant ethical breaches that resulted in little tangible change in reporting practices.

These are examples of “reactive metajournalistic discourse” (Carlson, 2016b, p. 358) where journalists respond to an event that captures their attention. In such cases, researchers call attention to a particularly animated moment of metajournalistic discourse where reflections about journalism’s meanings are brought to the fore by an interpretive community of journalistic insiders, typically (though not exclusively) responding in the journalistic works they create. This tradition emphasizes a critical incident as an incident that prompts journalists to engage in evaluative discourse that publicly negotiates their norms, routines, and boundaries.

That said, the chapters in Section III underline the necessity of querying journalism as a single “interpretive community.” In their chapter, Zhang and Jenkins (Chapter 3.3) look at patterns and differences both within and across press systems in coverage of the 2019 pro-democracy protests in Hong Kong, accounting for Chinese- and English-language news outlets in China, Hong Kong, and the United States. They demonstrate the multivocality of the press across national, political, and linguistic contexts, pointing to “competing interpretive communities.” The value of this work lies in its identification of distinct interpretive communities across contexts. Ogbebor (Chapter 3.2), meanwhile, alerts us to distinct interpretive communities within a context. Ogbebor’s chapter looks within a single press system—namely, the United Kingdom—and the sharp distinctions in stances toward the Leveson Inquiry among newspapers in a press system characterized by subjectivity and partisanship. Ogbebor conceptualizes these distinctions as indicative of “sub-interpretive spheres,” demonstrating the need to move away from theorizing press systems as monoliths. Each press is stratified by platform, political orientation, and geography (for example), leading to much variety in occupational norms. These chapters challenge us to both broaden (i.e., look across contexts) and deepen (i.e., look within a context) our understanding of what constitutes an interpretive community.

Is “journalism” writ large an interpretive community? Zelizer (2004) notes that “existing journalism scholarship has not produced a body of material that reflects all of journalism” and has instead privileged “a small (and decreasing) dimension of news making—hard news, and this has created a bias that undermines scholars’ capacity to embrace journalism in all of its different forms, venues, and practices” (p. 6). By way of illustration, lifestyle journalists, cultural critics, opinion columnists, and sports journalists (to name but a few examples) are rarely theorized as distinct interpretive communities. Why not? Similarly, if the scholarship to date has
emphasized the interpretive community of hard news reporters at legacy news organizations, to what extent do their parallels at digital-born news organizations engage in the same discursive repertoire? Should we assume that broadcast journalists and newspaper journalists belong to the same interpretive community when research has suggested sharp distinctions in their understandings of one another and their place in public life (see Meltzer, 2009)?

Scholars, when writing about interpretive communities, are therefore behooved to be specific about what aspect of the interpretive community they are referring to—to use Ogbebor’s (Chapter 3.2) conceptualization, which “sub-interpretive sphere”—and how it relates to the larger whole. As Carlson (Chapter 1.2) counsels in his chapter, the researcher ought to not flatten distinctions but elevate them to better understand competing interpretations. Put simply, journalists may “interpret, use, and engage in communication about the texts they create” (Berkowitz, 2019, p. 2), but not all journalists will interpret, use, and engage those texts in the same manner. Rather than speak of interpretive communities as singular entities, researchers can demonstrate how attention to interpretive subcommunities can reveal areas of agreement and divergence. Such work can help us elucidate journalism’s interior boundaries rather than emphasizing how—as boundary work research is prone to doing—journalists buttress their exterior ones.

It also bears noting that defining and distinguishing interpretive communities assume that journalistic reflection is a collective process. However, this process assumes—indeed, it requires—that members of the community speak to one another about their experiences. As Labiste (Chapter 3.1) proposes in her chapter, individual journalists may also engage in personal moments of reflection about particular characteristics of their work, or what she calls “auto-analysis.” This conceptual development has methodological implications. Studies of critical incidents in journalism that focus on metajournalistic discourse rely on what can be argued as institutional outputs—they reflect both an organizational process as well as, in most instances, organizational stance. But other studies rely on interviews with individual journalists, whose sensemaking reflect both their personal stance as well as the layers of contexts they have been socialized into. Scholars should consider, then, interpretive communities and their processes of reflection not only as a collective activity but also as an individual one that preserves the agency of community members.

**External interpretive communities**

When journalists interpret an incident in a certain fashion, it does not follow that these interpretations will be shared by those outside of journalism, who may have their own—and often sharply divergent—interpretations. Metajournalistic discourse is not only found in works of journalism but can also be located in blogs (Vos et al., 2012), social media comments (Carlson 2016a), and popular culture depictions of journalists (Ferrucci, 2018). In this volume, Chew and Tandoc’s chapter (Chapter 3.5) on social media comments regarding the boundaries of journalistic practice and platform governance illustrates how audience members engage in their
own evaluative discourse about journalistic acts. Cooper (Chapter 3.4) also documents the case of aid agencies reflecting on the changing news media ecosystem that made them rely on “mummy bloggers” to promote their causes and ultimately catch the attention of traditional journalists. Both chapters demonstrate how non-journalists engage in reflections about journalistic practices, which can also affect how journalists subsequently do their work.

This line of inquiry defines a critical incident as an incident that prompts non-journalists to engage in evaluative discourse about journalistic norms, routines, and boundaries. This body of work helps to understand how non-journalists take part in discursively negotiating the hows, whys, and what-should-bes of journalism, which is also consistent with studies focusing on the increasingly influential role of peripheral actors in journalism (Belair-Gagnon et. al., 2019; Tandoc, 2019). Studies have also explored how interpretive communities internal and external to journalism reflected on the same critical incident, such as in the outing of a magazine executive by the media site Gawker, where journalists and online readers both discussed how such an act crossed the boundary of ethical journalistic practice (Tandoc & Jenkins, 2018). This comparative orientation trains our attention to the nature of competing interpretations.

Overall, the discourse-centric approach, whether involving communities internal or external to journalism, emphasizes what is said about a given incident, what these discourses mean, and how they construct pertinent journalistic norms, routines, and boundaries. A critical incident brings these discussions into clearer focus.

**The consequence-centric approach**

The second relevant definition of “critical” pertains to consequences. This is to say that an incident is deemed critical because of its importance, impact, or significance. In contrast to the discourse-centric approach, the consequence-centric approach centers on material differences—actual things that change. This approach defines a critical incident less by the discourses it activates than by its results. An incident is critical if it has led to some discernible, significant change. Because of its focus on materiality, this approach can be located within the sociological or historical currents of journalism studies research, generally depending on the temporal arc involved. Here, two approaches warrant mention. First, we can identify incidents that led to changes to journalism. Second, we can identify incidents that led to changes to society.

**Changes to journalism**

The sociological study of journalism has traditionally focused on “work routines, interactions, and relationships among individuals/groups involved in news production, together with the organizations, institutions, structures, professional norms, and values that are part of news production” (Belair-Gagnon, 2019, p. 1). Consistent with a journalism studies-wide emphasis on change (see Carlson &
Lewis, 2019; Peters & Carlson, 2019), this research endeavors to understand these phenomena in the context of the changes “reordering news production” (Belair-Gagnon, 2019, p. 6). This volume illustrates how critical incidents can lead to a “reordering” of journalistic norms. Konow-Lund and Olsson’s chapter (Chapter 4.1) identifies a critical incident by way of its consequence, demonstrating how the murder of an investigative journalist led to unprecedented journalistic collaboration among journalists across continents in the form of the “Forbidden Stories” initiative. For Konow-Lund and Olsson, the “criticalness” of the incident lies not in what journalists said in response but what they did. Chavez’s chapter (Chapter 2.5) also documents the compromises that journalists in Mexico undertake to continue reporting despite the threats that come from drug cartels and corrupt police officers, such as removing author bylines and using anonymous sources in their news articles. Thus, this approach defines a critical incident as an incident involving journalism or journalists that leads or contributes to changes in journalistic practices.

Changes to society

Another approach emphasizes the consequences of an incident involving journalism for society. Birkner and Mallek (Chapter 4.2) take a consequence-driven approach by highlighting the effects of Der Spiegel’s work on German society and press-government relations. Drawing on the theory of mediatization, they identify an instance where journalistic actions have significant social and political ramifications—in the case they present, the resignation of the defense secretary and a rebalancing of the relationship between press and state power. It is noteworthy that this chapter works from historical distance, where the ramifications of a critical incident can be understood. This suggests that the discourse-centric stance lends itself more to a contemporaneous case study approach, while the consequence-centric stance lends itself to historical study. Accordingly, this approach leads to the definition of a critical incident as an incident involving journalism or journalists that leads or contributes to changes in society.

While an incident can be marked both by discourse among the members of an interpretive community and subsequent material change, an incident can also trigger discourse without material change, or what Nolan & Waller (Chapter 4.4) propose as an uncritical incident. By conceptually delineating discourse- and consequence-centric approaches to the study of critical incidents, we can argue that not yielding a tangible consequence does not undo a critical incident. Rather, it classifies it as a discourse-centric event.

A framework for studying critical incidents in journalism

The discourse-centric approach affords greater weight to meanings, judgment, and evaluation. It calls our attention to how interpretive communities (whether inside or outside of journalism) construct meaning about a given topic. To constitute a critical incident, from this perspective, an event must provoke sufficient discourse
among members of a given interpretive community. This understanding aligns particularly well with the cultural tradition of journalism studies. By contrast, the consequence-centric approach affords greater weight to significance, impact, and material change. It calls our attention to empirically identifiable changes (whether to journalistic practice or to wider society). To constitute a critical incident, from this perspective, an event must provoke sufficient ripple effects inside or outside of journalism beyond the discussion. This approach aligns with the sociological and historical traditions of journalism studies.

Table 5.1 proposes a framework for studying critical incidents in journalism. Consistent with our emphasis on pluralism, this should be treated as a simplified guide rather than an attempt at definitively sealing the boundaries of inquiry in this domain. It summarizes the priorities of the contrasting approaches and the journalism studies tradition they best reflect. In search of empirical referents, the scholar can look at matters internal to journalism (the discourse of journalistic insiders in the discourse-centric approach or changes in journalistic practices in the consequence-centric approach) or external to it (the discourse of non-journalists in the discourse-centric approach or journalism-facilitated changes in society in the consequence-centric approach).

However, this bifurcation is not absolute. Clearly, incidents can spark both journalistic reaction and material change. We cannot extricate journalistic norms from the discourses surrounding them, as this “skips over a necessary step” given that “explaining the articulation of a norm is part of explaining the norm” (Schudson, 2001, p. 150). As D’Angelo (Chapter 1.1) notes in his chapter, the variant definitions of critical incidents “share common meta-theoretical roots in social constructivism, where critical incident is characterized by an amalgamation of real occurrences and the discourses journalistic actors use to construct reality.” This classification also does not render one as more ideal than the other. An incident generating discourse, while not a tangible outcome, is still an important consequence. This is especially true in a period when technology—both its tools and the expectations they have created—has stretched journalists’ job scope, and journalists rarely have the time to reflect about the decisions they make or the factors that led them to those decisions. An incident providing, if not forcing, opportunities for reflection can function as an important pause for journalists.

**Additional considerations**

We pose three further considerations for critical incident research raised by the contents of this book, namely the need to be attentive to (1) temporality, (2) contextuality, and (3) the antecedents to critical incidents.

**Temporality**

In selecting an incident for study, the researcher must address the time between the incident under scrutiny and the empirical referent they are drawing on to make the
## TABLE 5.1 Proposed Framework for Studying Critical Incidents

<table>
<thead>
<tr>
<th><strong>Approach and priorities</strong></th>
<th><strong>Journalism studies tradition</strong></th>
<th><strong>Focus</strong></th>
<th><strong>Critical incident defined as</strong></th>
<th><strong>Empirical referent</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Discourse centric (meanings, judgment, evaluation)</td>
<td>Cultural</td>
<td>Internal</td>
<td>An incident that prompts journalists to engage in evaluative discourse that publicly negotiates their norms, routines, and boundaries</td>
<td>The discourse of journalists</td>
</tr>
<tr>
<td></td>
<td></td>
<td>External</td>
<td>An incident that prompts non-journalists to engage in evaluative discourse about journalistic norms, routines, and boundaries</td>
<td>The discourse of non-journalists</td>
</tr>
<tr>
<td>Consequence centric (significance, impact, material change)</td>
<td>Sociological or Historical</td>
<td>Internal</td>
<td>An incident involving journalism or journalists that leads or contributes to changes in journalistic practices</td>
<td>The impact of the incident on journalism</td>
</tr>
<tr>
<td></td>
<td></td>
<td>External</td>
<td>An incident involving journalism or journalists that leads or contributes to changes in society</td>
<td>The impact of the incident on society</td>
</tr>
</tbody>
</table>

case that the incident is “critical.” If we conceptualize a critical incident via the discourse-centric approach, where the empirical referent can be located in metajournalistic discourse, we can distinguish between local and durational interpretations (Zelizer, 1993), distinguished by the passage of time. The literature on paradigm repair and boundary work tends to be illustrative of local interpretations, taking the form of a (more) contemporaneous case study in highlighting journalistic responses closer to an event. By contrast, durational interpretations can often be found in the scholarship on collective memory, with the passage of time allowing
the researcher to look at the cultural construction of a phenomenon in full awareness of its material ramifications. Similarly, if we conceptualize a critical incident as a matter of consequences, empirical referents can be located in materially evident changes in journalism and/or society, which can be local (close) or durational (distant). A local approach would address immediate or near-immediate changes, such as those illustrated in Konow-Lund and Olsson’s chapter (Chapter 4.1). A durational approach would address wider ramifications with far more time having passed in the interim, as exhibited in Birkner and Mallek’s chapter (Chapter 4.2). The distinction may mark the boundary between sociological and historical approaches within journalism studies.

**Contextuality**

The chapters in this book illustrate the necessity of placing journalism into a larger social, political, and economic context. For example, Awino’s chapter (Chapter 2.4) on Kenya’s Truth, Justice and Reconciliation Commission (TJRC) demonstrates the alignment between a critical incident for Kenya as a nation and for Kenyan journalists. In this case, journalistic behavior constituted one element of many in a wider process of communal reflection. Similarly, in her chapter on Egyptian journalists’ struggle for professional autonomy, Badr (Chapter 4.3) contextualizes the renegotiation of journalistic norms and practices against the backdrop of the Tahrir Revolution. Badr demonstrates how these wider processes in the fight for a new political and economic settlement created the opportunity for self-reflective discourses among journalists rethinking seemingly settled orthodoxies. In the cases of these chapters, the critical incident is not specifically journalistic in nature but draws journalism into its orbit.

The chapters, overall, emphasize how, as Nolan and Waller (Chapter 4.4) put it, “the discursive constitution of ‘critical incidents’ does not occur in isolation, but emerges as part of, and is reliant upon, wider processes of institutional and societal struggle and reform.” Badr’s chapter (Chapter 4.3) on Egyptian journalism, where critical reflection occurred over many years in tandem with wider social and political changes in the country, and Madenga’s chapter (Chapter 2.6) on post-genocide Rwanda, where journalists strained to find a voice away from and outside the state, are instructive here. They illustrate the non-linear nature of progress and the structural impediments to social change, and the attendant influence that material conditions have on journalistic discourse. These chapters also demonstrate the importance of understanding critical incidents not necessarily as a single event but a wider process—that is, an aggregate of events.

Schudson (1997) has discussed the problems with treating journalism as central to historical change, a position that assumes that discursive chickens lay material eggs. Instead, we must recognize “the contingent nature of collective memory” and emphasize “the close relationship between discursive construction and material reality insomuch as material conditions create the framework upon which a discourse can build” (Thomas & Perreault, 2018, p. 1272). How an incident is
discursively constructed in its immediate aftermath does not lock that interpretation in for generations to come. Longitudinal discourse analyses can help to identify pivot points where the discourse evolves or sediments, as discourse “is a kind of collective meaning-making among interlocutors that emerges over time” (Vos & Perreault, 2020, p. 475, emphasis in original). Longitudinal analyses, then, help to link discourses to wider social forces. Longitudinal work, which out of necessity requires greater historical distance, can also look at the different forms these discourses take, from the initial journalistic output to interviews to books and textbooks and the ultimate collective memory that is constructed, and which voices might be missing.

**Antecedents**

Looking to the antecedents that explain how incidents come to be critical and why journalists respond the way they do can also be fruitful. As Ogbebor (Chapter 3.2) illustrates, British newspapers responded to the Leveson Inquiry in different ways depending, in general, on their political orientation. Forces shaping news production (see Shoemaker & Reese, 2014) like geography, market orientation, and role orientation also constitute factors that can shape how sub-interpretive spheres emerge in a particular context. The chapter by Udris and his colleagues (Chapter 2.3) is valuable in examining the structural antecedents to journalistic responses—that is, several factors might explain why journalists respond to critical incidents the way they do.

For more historically inclined scholars, attention to antecedents and causal linkages help elevate the field from the atheoretical storytelling to which it is sometimes prone (Schudson, 1997; Vos, 2013; Zelizer, 2004) to a more explanatory form of scholarship. The chapter by Birkner and Mallek (Chapter 4.2) is noteworthy because it pairs the critical incident concept with the theory of mediatization, providing theoretical heft to the study of journalistic and social change. Explanation is important because “ultimately, it matters to understand why something changes or stays the same” (Carlson & Lewis, 2019, p. 645).

**The role of the researcher**

The ultimate definer of critical incidents is the researcher who attaches the concept to an event as a mode of explanation. Although the process of conceptualization is designed to ensure a close relationship between an abstract concept and its empirical referent (Chaffee, 1991), scholars and practitioners of journalism may not necessarily use the same verbiage (though their discourse may reflect shared underlying criteria). From this metatheoretical perspective, critical incidents are ultimately those incidents deemed significant by journalism researchers. In naming an event a critical incident, scholars attempt to shed light on its significance and define the contours of a particularly important moment in time. The responsibility falls to the researcher to make a persuasive, theoretically informed, and data-rich case as to
why a given event warrants standing as a critical incident, marshalling empirical evidence by way of a singularly intense discourse (whether of journalists, non-journalists, or both) or patterns of identifiable change either in journalism or society, or both.

In deigning an event as a critical incident in journalism, the researcher takes part in journalistic reflection. Focused on the daily demands of journalistic work, journalists might not be always self-aware that they are engaging in moments of introspection while news organizations might not always realize that through their respective outputs they are engaging in a collective discourse. In posting their comments or critique, news audiences and other actors external to journalism might also not always realize that they are taking part in an ongoing negotiation of the contours of journalistic work. The researcher, examining a critical incident in journalism, brings together such introspections, taking part in a larger sensemaking about journalism. Therefore, the epistemic practice of socially constructing “incidents” as “critical” must also be scrutinized and contested. The study of critical incidents is surrounded by normativity and self-justification; thus, scholars must ask critical questions about critical incidents, such as what they do and why they are vital to the journalism sector. Do critical incidents reify existing journalistic norms and values? Do they allow journalists to learn from past mistakes or do they gloss over them? Do they allow journalists to brace for shifts or threats to their current practices? Do they serve more to preserve the field or transform it?

The continued relevance of critical incidents

This book presents a collection of how critical incidents in journalism unfolded across time and across countries, documenting meaning-making and material changes that emerged from these introspections. Through these case studies, we saw examples of how journalists uphold their autonomy in the face of various threats, from state repression to physical violence to financial pressures. Introspections about journalistic acts, whether from journalists themselves or from non-journalists, consistently recognize the utmost importance of keeping the public informed. Fulfilling this function is possible only with the assurance of journalistic autonomy, so that even when members of the community are in the wrong, the interpretive community focuses on self-correction, such as by discursively locating the erring journalist or the unacceptable act as outside the boundaries of the profession or minimizing the discourse around it.

Critical incidents in journalism continue to emerge. The COVID-19 pandemic, for example, affected different aspects of journalistic work, and scholars have also called for reassessment of the objects and objectives that journalism scholars focus on (see, e.g., Lewis, 2020). Thus, studying critical incidents in journalism continues to be crucial. These pivotal moments provide insight into journalistic sensemaking. In organization studies, the sensemaking approach focuses on the interplay of what professionals say and do, and how interpretations of events guide actions and vice versa (see, e.g., Daft & Weick, 1984; Weick et al., 2005). Social actors in
organizations extract and make sense of cues in their environments, and by paying attention to specific events and phenomena, they demonstrate how they value their importance both instrumentally and symbolically. In identifying discourse-centric and consequence-centric approaches to studying critical incidents in journalism, this book also calls attention to investigating the link between what journalists say and do. Investigating critical incidents in journalism can reveal a potential mismatch between these two, which can have larger social implications. For example, Sybert’s analysis (Chapter 2.2) of how news organizations reported on two children affected by the Syrian civil war illuminated how children’s voices were simultaneously amplified by social media and excluded from traditional media, with potentially powerful implications for public understanding and policy around war and conflict.

By featuring conceptual articles and case studies of critical incidents in journalism originating from many corners of the world, this book offers opportunities for learning about these critical incidents and how journalists function as members of interpretive communities, offering glimpses into how journalists and other stakeholders reflect on various aspects of journalistic work. We have also sought to clarify the concept and study of critical incidents in journalism by examining the conceptualization, characteristics, communities, and consequences involved. We hope that what we have started in this book can help to guide future efforts in critically exploring and examining critical incidents in journalism, which can reveal lessons that may be critical to journalism’s future.

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