COMUNICAÇÃO E SOCIEDADE

44

QUALITY OF JOURNALISM

QUALIDADE DO JORNALISMO

Thematic editors | Editores temáticos
Sandra Marinho
Luís Miguel Loureiro
Dolors Palau-Sampio

Directors | Diretores
Madalena Oliveira & Daniel Brandão

CECS centro de estudos de comunicação e sociedade PUBLICAÇÃO

COMUNICAÇÃO E SOCIEDADE Vol. 44 | 2023

revistacomsoc.pt

Title | *Título*: Quality of Journalism | *Qualidade do Jornalismo*

Editorial Production | *Produção Editorial*
Editorial Assistance | *Assistência Editorial*: Sofia Salgueiro, Centro de Estudos de Comunicação e Sociedade, Universidade do Minho, Portugal
Translation and Linguistic Revision | *Tradução e Revisão Linguística:* Anabela Delgado, Centro de Estudos de Comunicação e Sociedade, Universidade do Minho, Portugal

Indexation and Integrations | *Indexação e Integrações*
SCOPUS | SciELO | ERIH PLUS | Qualis Capes (A3) | MIAR | Latindex | CIRC (B) | OpenEdition | Google Scholar | Academia Search Premier | BASE | CEDAL | DOAJ | Journal TOCs | MLA | RevisCOM | Open Access in Media Studies | REDIB | OAIster | EZB | ROAD | COPAC | ZDB | SUDOC | RepositóriUM | RCAAP | Dialnet

Cover Image | *Imagem da Capa*: Suzy Hazelwood (2020) **Cover Design** | *Design da Capa*: Sofia Gomes

URL: https://revistacomsoc.pt/
Email: comunicacaoesociedade@ics.uminho.pt

The journal *Comunicação e Sociedade* is published twice a year and is bilingual (Portuguese and English). Authors who wish to submit should go to URL above.
A Comunicação e Sociedade *é editada semestralmente (dois volumes/ano), em formato bilingue (português e inglês). Os autores que desejem publicar devem consultar o URL da página indicado acima.*

Publisher | *Editora*:
CECS – Centro de Estudos de Comunicação e Sociedade
Universidade do Minho
Campus de Gualtar
4710-057 Braga – Portugal

Phone | *Telefone*: (+351) 253 601751
Fax: (+351) 253 604697
Email: cecs@ics.uminho.pt
Web: www.cecs.uminho.pt

e-ISSN: 2183-3575

This publication is funded by national funds through Fundação para a Ciência e a Tecnologia, I.P., within the Multiannual Funding of the Communication and Society Research Centre 2020-2023 (which integrates base funding UIDB/00736/2020 and programmatic funding UIDP/00736/2020).
Esta publicação é financiada por fundos nacionais através da FCT – Fundação para a Ciência e a Tecnologia, I.P., no âmbito do Financiamento Plurianual do Centro de Estudos de Comunicação e Sociedade 2020-2023 (que integra as parcelas de financiamento base, com a referência UIDB/00736/2020, e financiamento programático, com a referência UIDP/00736/2020).

Contents | *Sumário*

Thematic articles | *Artigos Temáticos*

Book Reviews | *Leituras*

Varia | *Varia*

Comunicação e Sociedade, vol. 44, 2023, e023025
https://doi.org/10.17231/comsoc.44(2023).5491

Introductory Note: Quality of Journalism

Nota Introdutória: A Qualidade do Jornalismo

Sandra Marinho
Centro de Estudos de Comunicação e Sociedade, Instituto de Ciências Sociais, Universidade do Minho, Braga, Portugal

Luís Miguel Loureiro
Centro de Estudos de Comunicação e Sociedade, Instituto de Ciências Sociais, Universidade do Minho, Braga, Portugal

Dolors Palau-Sampio
Departament de Teoria dels Llenguatges i Ciències de la Comunicació, Facultat de Filologia, Traducció i Comunicació, Universitat de València, Valencia, Spain

Quality of journalism, in journalism, within journalism. Irrespective of the phrasing (which is not indifferent and contains particularities we will not discuss here), this concept has an enduring tradition in the scientific field of journalism and communication studies. However, over the last few years, due to the economic and technological transformations in the media ecosystem — in which journalism operates — this debate has gained renewed interest, seeking solutions or strategies that allow understanding and addressing numerous issues. These include the need for new business models or the sustainability of journalism (according to the theoretical perspectives of this argument), the fight against misinformation, the relationship between journalism — and the production of journalistic narratives — and the production of journalistic narratives with formal professional sources (consultancies, public relations) or informal ones (spin doctors) or even the profound changes in the dynamics of newsrooms and work routines.

Nowadays, journalism is a point of confluence of a wider range of issues. Some argue that the quality of the political experience of today's societies and citizens is recognised to be directly related to the quality of the information produced by journalists and the media. However, this fact seems no longer enough to safeguard journalism from the threats hanging over it and the crises surrounding it in the last decades. Hence, we contend that studying and discussing the quality of journalism holds social significance; it is relevant within the journalistic field, impacting journalists directly, and has relevance within academia from a scientific standpoint.

The premise that studying the quality of journalism is socially relevant is grounded in the attributed role of journalism within democratic societies and its contribution to fostering citizenship (Adam & Clark, 2006; Carey, 1999; Curran et al., 2009; Franklin, 1997; Hackett & Uzelman, 2003; Harris, 2001; Kovach & Rosenstiel, 2003; McNair, 2000; Meier, 2019; Meyer, 2004; Patterson, 2000; Tsfati et al., 2006). However, the relationship between journalism and democracy has challenges (Curran, 2005). It is crucial to note that while there is a natural connection between journalism and democracy, it should not be assumed that journalism has the ability or obligation to create democracy (Schudson, 2003).

The quality of journalism, extensively deliberated in literature, emerges as a multidimensional and intricate concept that defies easy definition and assessment (Lacy & Rosenstiel, 2015; Maguire, 2005; Molyneux & Coddington, 2020; Picard, 2000, 2004; Rosenstiel & Mitchell, 2004; Shapiro, 2010). On the one hand, this feature represents an epistemological challenge and creates difficulties in its empirical implementation (but does not make it impossible, as research has shown). On the other hand, it gives it the flexibility often necessary when it comes to changing ecosystems to attain the ability to become an operational and coordinating concept, shared with other related concepts like "credibility".

While establishing precise definitions or methods for assessing the quality of journalism proves challenging, there has been notable scientific production in this field, with diverse proposals targeting different dimensions of its implementation. Efforts have been made to organise this body of work through meta-analyses of the literature (Marinho, 2015; Pinto & Marinho, 2004). The editors of this volume propose organising these contributions around three approaches (that are not rigidly defined or mutually exclusive): literature that focuses on assessing the quality of journalism essentially from the perspective of the news production processes and conditions, literature mainly centred on the news product and its inherent attributes; and literature primarily addressing the assessment of quality from the viewpoint of audiences and their uses (including the accessibility of content). Gómez-Mompart and Palau-Sampio (2013) add those dimensions when defining quality in journalism:

> journalistic quality embodies different processes involved in gathering and handling information. It emerges from upholding standards of balance and impartiality, contrast and plurality — aligning with ethical codes and self-regulation standards. Simultaneously, it demands diversity and originality — in content and treatment — thorough research, in-depth study and independence — from political conditions and economic pressures. All these elements prevent journalism from being detached from specific production conditions and the context of its reception. (p. 35)

This perspective brings us to another central idea: the study of journalism and its quality is contextual and reliant on the axes that "shape, influence, and enhance it" (Pinto & Marinho, 2004, p. 576). This is because "journalists operate within specific socio-cultural contexts and timeframes, elements that structure and at times impose constraints on their work" (Marinho, 2015, p. 125).

Within this framework, it is crucial to acknowledge that journalistic production occurs within the broader information/data production and dissemination ecosystem. Today, information permeates every facet of contemporary society. As such, the journalistic production of information stands as a crucial element in the relationship between societies and their foundational elements, serving as a primary method for constructing narratives rooted in reality to elucidate and uphold social experiences.

Contrary to what formed the historical core of journalism's growing social centrality until the emergence of the internet, journalistic information is increasingly produced in an immense informational environment that, besides outspreading and diluting it, simultaneously forces it to be competitive. Journalism still has a reserve of legitimacy, bestowing authority to the information it produces. This legitimacy is based, on the one hand, on the tradition related to its fundamental role in developing the modern public sphere and, on the other hand, on the general knowledge of the internal and external control mechanisms of journalistic practices for journalistic production is supposed to be scrutinised from its *ethos* and *praxis*. However, the modes of competition in which it is progressively immersed bring it closer and closer to the possibility of exhausting that reserve. Hence, the constantly discussed threats to journalism are rooted in its economic sustainability models, which impose the urgency of competing for visibility metrics. But also in the intrinsic information production models, which qualify it or not as public interest information and make it compete with the production of information not mediated by journalists.

There is no doubt that journalism has perpetually existed amidst tensions. Over the last two centuries, with the escalating industrialisation of journalistic production, establishing newsrooms as the epicentre of news creation marked the pivotal juncture, the decisions between what aspects of the world *are showcased* and what *remains concealed*, *the methods that reveal more* and *those that reveal less*, the newsroom became the quintessential place where these tensions unfolded.

In this sense, it is important for scientific reflection to challenge the oversimplified aphorism that *journalism depends on the existence of journalists* — which places the core of the problem in issues such as the precariousness and depletion of newsrooms, which play a fundamental role in assessing certain quality conditions, but are insufficient to account for all the tensions that pervade the field. Hence, analysing the *quality of journalism* must consider the study of journalists' current extent of agency, which involves understanding how the *individual dimensions of the journalistic act* can manifest within the conditions of the possibility of contemporary journalistic production (Loureiro, 2023). Indeed, journalists acknowledge a decline in the quality standards of journalistic products, a trend they attribute to the ongoing crisis within the sector (Gómez-Mompart et al., 2015).

Research into the quality of journalism holds significance not only for the journalistic field and journalists themselves but also encompasses another dimension: the quality of journalism can serve as a "strategic investment" (Marinho, 2015; Pinto & Marinho, 2004). This concept implies that investing in the quality of journalism can yield financial returns, suggesting a symbiotic relationship between quality and business within the field. This perspective — the association (not necessarily causal) between investment and revenue — has been explored from different angles by several authors (Allern, 2002; Bogart, 2004; Edmonds, 2004; Lacy & Martin, 2004; Meyer, 2004; Meyer & Kim, 2003; Rosenstiel & Mitchell, 2004). This is a relevant axis, especially when aligned with the public/audience: the quality of journalism as a path to credibility and fostering the establishment/maintenance of trust among the public, based on the assumption that more audience/consumption would generate a higher financial return.

Journalism is exposed in a field where its economic survival, social relevance, suitability to the technical and technological environments in which it is immersed, and objective and subjective conditions in which it is produced are simultaneously at stake. Thus, analysing *quality in journalism* means embracing an increasingly complex public problem that only a multidimensional scientific approach can attempt to address — even though it risks falling short of the mark.

We proposed organising the literature on the quality of/in journalism into three approaches: first, works that address journalism quality assessment by examining the process and conditions of news production; second, those focusing on the news as products and their attributes; and finally, those that approach quality assessment by considering audiences and their uses. The thematic section of this volume comprises eight articles — ranging from theoretical reviews to empirical approaches — primarily falling within the first two approaches. However, that does not mean these texts do not consider the public and the relationship between journalism and its audiences. As emphasised, these are not watertight or mutually exclusive approaches. Their arguments primarily steer clear of examining how the public engages with news reception and assesses journalistic quality.

Most of the contributions (five out of eight) are categorised within the first approach — focusing on the quality of journalism from the perspective of the process and conditions of news production Pedro Coelho's text on "New Frontiers of Investigative Journalism: From the Lone Wolf to the Pack"; "A New Form of Precarity (of Practice)? Professional Deskilling at the Centre of the Hijacking of Quality in Journalism", by Tiago Lima Quintanilha; " The Strategic Approach to Quality in Journalism: Innovation, Technology and Applied Research", by Josenildo Luiz Guerra; the article on "Local Journalists and Fact-Checking: An Exploratory Study in Portugal and Spain", by Pedro Jerónimo and Marta Sánchez Esparza; and Marta Santos Silva's contribution, "'I Don't Have the Necessary Conditions': How Television and Radio Journalists Rate the Quality of Journalism in Portugal". Within the second approach — assessing the quality of journalism based on news as products and their inherent attributes — we encompass two contributions: "Transparency as a Quality Dimension: Media Ownership and the Challenges of (In)visibility" by Alexandra Figueira and Elsa Costa e Silva; and "Responsability and Quality of Journalism: Digital Accountability Instruments and Practices in the Portuguese Media", by João Miranda. Finally, the section closes with a systematic literature review of the "quality journalism" concept: "Bibliometric Study on Quality Journalism in the Scopus Database: Evolution of the Topic and Characteristics" by Luisa del Carmen Martínez García and Edson Capoano.

Regarding the first set of texts, three tackle, from varying perspectives, the influence of technological advancements on determining the quality of produced journalism and/or its assessment. Pedro Coelho, in "New Frontiers of Investigative Journalism: From the Lone Wolf to the Pack", builds on the rejection of the idea that all journalism is, by nature, investigative in order to choose "journalistic investigation as the prime embodiment of high-quality journalism" (p. 1) and "seeks to identify potential solutions that can sustain the *watchdog* role associated with investigative journalism" (p. 1). He acknowledges the role of digital technology in these solutions. However, he cautions that "investigative journalism may be living a second life, but there is a risk that this rebirth is not reaching everyone, and it should not be overlooked" (p. 15).

In "A New Form of Precarity (of Practice)? Professional Deskilling at the Centre of the Hijacking of Quality in Journalism", Tiago Lima Quintanilha delves into the results of systematising the literature on professional deskilling. He concludes that journalists are facing the creation of a new type of practice-related instability, "able to capture journalistic quality and which goes beyond the traditional and well-documented precarity of employment and labour" (p. 1). Given journalism's susceptibility to the effects and pace of technological evolution, the author highlights the implications of this exposure on "the quality of journalism and the deterioration of the journalistic product" (p. 13). However, he acknowledges the potential for technology to facilitate a process of "professional reskilling and the rescuing of quality journalism supported by an infrastructure that takes care of the trivialised tasks of the profession" (p. 13).

In "The Strategic Approach to Quality in Journalism: Innovation, Technology and Applied Research", Josenildo Luiz Guerra describes quality in journalism as "an organisational effort that integrates external conditions and demands with internal actions, from planning to final product delivery" (p. 1) and proposes that it be evaluated from a quality management system, understood as "a set of integrated actions that aligns assessment with editorial management guidelines, production processes and products. The implementation of this proposal requires investment in innovation" (p. 1), which will involve, among other things, leveraging the technological potential available to companies and journalists, for the author, this investment is justified since "the current editorial model lacks metrics and rigorous methods for measuring the quality claimed by organisations, failing to uphold the trust placed by society in these professionals and companies" (p. 16).

Pedro Jerónimo and Marta Sánchez Esparza, and Marta Santos Silva, also focus on the process and conditions of news production by gathering insights from journalists. Through surveys, these researchers delve into the practices and perspectives of these pivotal actors in this dynamic. In "Local Journalists and Fact-Checking: An Exploratory Study in Portugal and Spain", Pedro Jerónimo and Marta Sánchez Esparza interview journalists from 12 local media outlets in Portugal and Spain to collect and analyse their perspectives and approaches to fact-checking. The analysis identified internal (or subjective) and external factors that condition the ability and ways of verifying information: "time limitations and a shortage of personnel to perform the task optimally" (p. 13) and "excessive reliance on official sources, sometimes combined with sloth — as Portuguese journalists admit" (p. 14). One positive aspect is highlighted: "journalists are aware of the problem and how the decline in the quality of information undermines public confidence", and they are "the first to take an interest in tackling these problems, learning from their experiences and implementing new approaches in their newsrooms" (p. 14).

Marta Santos Silva, in "'I Don't Have the Necessary Conditions': How Television and Radio Journalists Rate the Quality of Journalism in Portugal", through semi-structured interviews with 11 radio and television journalists in Portugal, seeks to answer two questions: how do television and radio journalists define quality journalism? And how do television and radio journalists assess the quality of journalism produced in Portugal? The analysis points to

> the lack of investment or funding for newsrooms, the resulting reduction in human resources, and the lack of time to devote to journalistic work, which is partly the result of this loss of labour, and partly driven by competitive dynamics and the speed of the digital medium. (p. 15)

While opinions on the quality of television and radio journalism in Portugal vary among interviewees, most believe that "their working conditions for producing good journalism fall short of what is desired" (p. 16). It is also clear "that journalists are able and willing to make negative assessments of their own work and to justify these assessments by stating the factors that cause the results to fall short of what is desired" (p. 16).

As for the articles centred on assessing the quality of journalism based on news as products and their inherent attributes, this imprint is evident in two of the contributions in the thematic section, both dedicated to discussing — from different perspectives — media regulation: the text entitled "Transparency as a Quality Dimension: Media Ownership and the Challenges of (In)visibility", by Alexandra Figueira and Elsa Costa e Silva, and the article "Responsibility and Quality of Journalism: Digital Accountability Instruments and Practices in the Portuguese Media", by João Miranda. These two texts, even though they do not assess the quality of journalism from the standpoint of public reception, underscore a crucial aspect: comprehensive, clear and transparent information on media ownership and companies' accountability mechanisms is a pre-requisite for establishing and sustaining the trust of citizens/readers, and, ultimately, for promoting news consumption and people's interest (Hermans & Drok, 2018), which does not necessarily have positive implications if we consider the pressures introduced into journalists' work by audience measurement (Meijer, 2013), which is increasingly present in newsrooms. By integrating these articles into an approach examining quality from the viewpoint of the attributes or characteristics of the journalistic product, the term "product" is understood broadly. It also encompasses the information made publicly available by companies/organisations about their nature and procedures.

Alexandra Figueira and Elsa Costa e Silva's "Transparency as a Quality Dimension: Media Ownership and the Challenges of (In)visibility" draws from the regulatory decisions of the Portuguese Regulatory Authority for the Media and "examines how the principle of media transparency is perceived in the Portuguese market, analysing non-compliance and objections to disclosing the required information" (p. 1). The analysis points to a "lack of broad reflection on transforming it [transparency] into a tool serving public communication policies that foster, for instance, independence and diversity in journalism" (p. 16) and that "public engagement in discussing the risks associated with media ownership in Portugal" (p. 15) remains a distant prospect. In other words, the authors emphasise that "transparency alone does not deliver the expected outcomes" (p. 16) and that "transparency in terms of ownership of production does not solve the need for transparency in terms of distribution" (p. 16).

João Miranda, in "Responsibility and Quality of Journalism: Digital Accountability Instruments and Practices in the Portuguese Media", reflects on the "relationship between media accountability and the quality of journalism while also examining how new forms of media responsibility could enhance information quality" (p. 1), based on an "exploratory study mapping and analysing the level of implementation of digital responsibility and accountability mechanisms of six Portuguese editorial projects" (p. 1). The analysis highlights

> on the one hand, the heterogeneous reality and potential underlying the adaptation of conventional responsibility models to online formats. It also underscores the mandated nature of media accountability and transparency processes, suggesting the need for further in-depth research into this phenomenon. (p. 18)

It also underlines "[the expansion of] new opportunities for mobilising and broadening the scope of these journalism quality monitoring processes. They have also heightened the potential for user participation and dialogue between the media and their audience" (p. 18).

The thematic section is completed with the article "Bibliometric Study on Quality Journalism in the Scopus Database: Evolution of the Topic and Characteristics" by Luisa del Carmen Martínez García and Edson Capoano. In the systematic review, based on a sample of 971 scientific articles published between 1939 and 2022 and indexed in Scopus, the authors conclude that "there is no watertight definition of what the quality of journalism is, at least in the sample collected. Instead, there are dynamic definitions shaped by evolving demands and ongoing debates" (p. 15), although anchored "in the thematic debates prevalent within the journalistic field, such as the challenges of disinformation in the 2020s, the proliferation of digital communication during the 2010s and the methodologies and genres emerging and re-emerging in the field" (p. 15) or even the "changes in the craft and societal expectations throughout the analysed period" (p. 15).

As previously noted, scientific output on the quality of journalism has been substantial. However, as editors of the thematic section of this volume, we emphasise the importance of acknowledging that this topic might fade from the research agenda. Due to its intricate associations with many other concepts and dimensions of journalistic practice, it is a pivotal concept, significantly contributing to their comprehension and coordination. Hence, this issue of *Comunicação e Sociedade* challenges the scientific community to reflect on quality in journalism, both as a theoretical field of intersection and insertion of journalistic production in information production and as a field of empirical research into the quality(ies) that characterise contemporary journalistic production and affirm it as an inalienable value in the ongoing construction of citizenship.

Translation: Anabela Delgado

Acknowledgements

This work is supported by national funds through FCT – Fundação para a Ciência e Tecnologia, I.P., under the project UIDB/00736/2020 (base funding) and UIDP/00736/2020 (programme funding).

References

Adam, G. S., & Clark, R. P. (2006). *Journalism: The democratic craft*. Oxford University Press.

Allern, S. (2002). Journalistic and commercial news values. News organizations as patrons of an institution and market actors. *Nordicom Review*, *23*(1/2), 137–152. https://doi.org/10.1515/nor-2017-0327

Bogart, L. (2004). Reflections on content quality in newspapers. *Newspaper Research Journal*, *25*(1), 40–53. https://doi.org/10.1177/073953290402500104

Carey, J. (1999). Lawyers, voyeurs, and vigilantes. *Media Studies Journal*, *13*(2), 16–17.

Curran, J. (2005). Mediations of democracy. In J. Curran & M. Gurevitch (Ed.), *Mass media and society* (pp. 122–145). Hodder Arnold.

Curran, J., Iyengar, Sh., Lund, A. B., & Salovaara-Moring, I. (2009). Media system, public knowledge and democracy: A comparative study. *European Journal of Communication*, *24*(5), 5–26. https://doi.org/10.1177/0267323108098943

Edmonds, R. (2004). News staffing, news budgets and news capacity. *Newspaper Research Journal*, *25*(1), 98–109. https://doi.org/10.1177/073953290402500108

Franklin, B. (1997). *Newszak and news media*. Arnold.

Gómez-Mompart, J. L., Gutiérrez-Lozano, J. F., & Palau-Sampio, D. (2015). Los periodistas españoles y la pérdida de la calidad de la información: El juicio profesional. *Comunicar: Revista Científica de Comunicación y Educación*, *22*(45), 143–150. https://doi.org/10.3916/C45-2015-15

Gómez-Mompart, J. L., & Palau-Sampio, D. (2013). El reto dela excelência: Indicadores para medir la calidad periodistica. In J. L. Gómez-Mompart, J. F. Gutiérrez-Lozano, & D. Palau-Sampio (Eds.), *La calidad periodística: Teorias, investigaciones y sugerencias profesionales* (pp. 17–38). Universitat Autònoma de Barcelona/Universitat Pompeu Fabra.

Hackett, R. A., & Uzelman, S. (2003). Tracing corporate influences on press content: A summary of recent NewsWatch Canada research. *Journalism Studies*, *4*(3), 331–346. https://doi.org/10.1080/14616700306486

Harris, J. (2001). The bottom line: Profits and journalism in newspapering. *The Harvard International Journal of Press/Politics*, *6*(4), 106–112. https://doi.org/10.1177/108118001129172369

Hermans, L., & Drok, N. (2018). Placing constructive journalism in context. *Journalism Practice*, *12*(6), 679–694. https://doi.org/10.1080/17512786.2018.1470900

Kovach, B., & Rosenstiel, T. (2003). *The elements of journalism*. Atlantic Books.

Lacy, S., & Martin, H. J. (2004). Competition, circulation and advertising. *Newspaper Research Journal*, *25*(1), 18–39. https://doi.org/10.1177/073953290402500103

Lacy, S., & Rosenstiel, T. (2015). *Defining and measuring quality journalism*. Rutgers School of Communication and Information.

Loureiro, L. M. (2023). Jornalismo e ativismo: Um repórter português do lado russo da guerra na Ucrânia. *Communication, Technologies et Développement*, (13), 1–23. https://doi.org/10.4000/ctd.8598

Maguire, M. (2005). Changes in ownership affect quality of Oshkosh paper. *Newspaper Research Journal*, *26*(4), 74–86. https://doi.org/10.1177/073953290502600407

Marinho, S. (2015). *Jornalismo e formação em mudança: Modelos e construções na análise do caso português*. CECS.

Meijer, I. C. (2013). Valuable journalism: A search for quality from the vantage point of the user. *Journalism*, *14*(6), 754–770. https://doi.org/10.1177/1464884912455899

McNair, B. (2000). *Journalism and democracy: An evaluation of the political public sphere*. Routledge.

Meier, K. (2019). Quality in journalism. In T. P. Vos, F. Hanusch, D. Dimitrakopoulou, M. Geertsema-Sligh, & A. Sehl (Eds.), *The international encyclopedia of journalism studies* (pp. 1–8). Wiley. https://doi.org/10.1002/9781118841570.iejs0041

Meyer, P. (2004). The influence model and newspaper business. *Newspaper Research Journal*, *25*(1), 66–83. https://doi.org/10.1177/073953290402500106

Meyer, P., & Kim, K.-H. (2003). Quantifying newspaper quality: "I know it when I see it". In *Proceedings from the Association for Education in Journalism and Mass Communication* (pp. 1–10). ERIC.

Molyneux, L., & Coddington, M. (2020). Aggregation, clickbait and their effect on perceptions of journalistic credibility and quality. *Journalism Practice*, *14*(4), 429–446. https://doi.org/10.1080/17512786.2019.1628658

Patterson, T. (2000). *Doing well and doing good: How soft news and critical journalism are shrinking the news audience and weakening democracy — And what news outlets can do about that*. Joan Shorenstein Centre on the Press, Politics and Public Policy.

Picard, R. (2000). Measuring quality by journalistic activity. In R. Picard (Ed.), *Measuring media content, quality, and diversity: Approaches and issues in content research* (pp. 97–103). Media Economics, Content and Diversity Project; Media Group, Business Research and Development Centre.

Picard, R. (2004). Commercialism and newspaper quality. *Newspaper Research Journal*, *25*(1), 54–65. https://doi.org/10.1177/073953290402500105

Pinto, M., & Marinho, S. (2004). A qualidade em jornalismo: Problematização e operacionalização do conceito. In J. P. Sousa (Ed.), *Jornalismo de referência – Actas do I Congresso Luso-Brasileiro de Estudos Jornalísticos/II Congresso Luso-Galego de Estudos Jornalísticos* (pp. 571–579). Edições Universidade Fernando Pessoa.

Rosenstiel, T., & Mitchell, A. (2004). The impact of investing in newsroom resources. *Newspaper Research Journal*, *25*(1), 84–97. https://doi.org/10.1177/073953290402500107

Schudson, M. (2003). *The sociology of news*. W. W. Norton & Company.

Shapiro, I. (2010). Evaluating journalism. *Journalism Practice*, *4*(2), 143–162. https://doi.org/10.1080/17512780903306571

Tsfati, Y., Meyers, O., & Peri, Y. (2006). What is good journalism? Comparing Israeli public and journalists' perspectives. *Journalism*, *7*(2), 152–173. https://doi.org/10.1177/1464884906062603

Biographical Notes

Sandra Marinho has a PhD in Communication Sciences from the University of Minho, focusing on the quality of journalism education. She has been a lecturer at the same institution since 1997, teaching in research methodologies, communication theories and journalism. She is a researcher at Communication and Society Research Centre, where she researches the quality of journalism education and the quality of journalism/information/communication. She is a Barómetro de Qualidade da Informação (Information Quality Barometer) member and has contributed to numerous national and international research projects. She has held various leadership roles, including directing bachelor's and master's programs in Communication Sciences at University of Minho. She spearheaded the *REC | Repórteres em Construção* educational project and co-founded it. Formerly, she served as vice director of the Communication and Society Research Centre and presently sits on the executive committee of IDEA-UMinho Centre, which fosters pedagogical innovation and skills development of the University of Minho's teaching ecosystem. She is the director of the journalistic project *Flor do Tâmega*.

ORCID: https://orcid.org/0000-0003-2013-229X

Email: marinho@ics.uminho.pt

Address: Universidade do Minho, Instituto de Ciências Sociais, Campus de Gualtar, 4710-057, Braga, Portugal

Luís Miguel Loureiro has a degree in Biochemistry from the University of Coimbra and a PhD in Communication Sciences from the University of Minho, where he has been a professor since 2021. He was a radio and television journalist for 30 years, a war correspondent in the Middle East (Israel-Hezbollah war, 2006), and a senior reporter and investigative journalist, awarded individually and collectively. He was co-responsible for and author of the journalistic investigations for the *Sexta às 9* (Friday at 9) programme (RTP) into the lithium exploration concession in Portugal, which were at the origin of the judicial investigation that, in November 2023, brought down the third Government of Prime Minister António Costa. After his doctorate, he continued his academic and scientific career at Universidade Lusófona (Porto), where, from 2012 to 2021, he coordinated the degree in Communication Sciences and the master's degree in Communication, Networks and Technologies and was also a member of the teaching staff for the doctorates in Communication Studies for Development and Media Arts. He has taught communication and journalism ethics, investigative journalism, journalistic genres and network activism and has led research seminars. He is currently teaching courses on journalistic narratives and the various practical areas of journalism, particularly audiovisual journalism. He is a researcher at the Communication and Society Research Centre and coordinates the Barómetro de Qualidade da Informação (Information Quality Barometer). He has been researching the sociology of communication, new media, network activism, journalism, and television studies.

ORCID: https://orcid.org/0000-0003-3201-8013

Email: luisloureiro@ics.uminho.pt
Address: Universidade do Minho, Instituto de Ciências Sociais, Campus de Gualtar, 4710-057, Braga, Portugal

Dolors Palau-Sampio has a degree and PhD in Journalism (2008, Extraordinary Award) from the Universitat Autònoma de Barcelona. She has been lecturing journalism at the Universitat de València since 2000 and has been an editor at the Levante-EMV newspaper for nine years. Her lines of research focus on journalistic quality and ethics, narrative and digital journalism and media discourse analysis. She has published over 40 articles in indexed journals, including *El Profesional de la Información*, *Communication & Society*, *Comunicar*, *International Journal of Communication* and *Journal of Communication Inquiry*. She has authored the book *Els Estils Periodístics. Maneres de Veure i Construir la Realitat* (Journalistic Styles. Ways of Seeing and Constructing Reality, 2005) and over 30 book chapters and has delivered approximately 120 papers at conferences, many of them international. She was vice-dean of Communication and Participation at the Faculty of Philology, Translation, and Communication at the Universitat de València.

ORCID: https://orcid.org/0000-0001-9051-0239
Email: dolors.palau@uv.es
Address: Facultat de Filologia, Traducció i Comunicació. Avinguda Blasco Ibáñez, 32. 46010 Valencia (España)

Comunicação e Sociedade, vol. 44, 2023, e023015
https://doi.org/10.17231/comsoc.44(2023).4561

New Frontiers of Investigative Journalism: From the Lone Wolf to the Pack

Pedro Coelho
ICNOVA, Faculdade de Ciências Sociais e Humanas, Universidade NOVA de Lisboa, Lisbon, Portugal

Abstract

This paper resorts to a literature review to cover 100 years of investigative journalism history, focusing on the concept by choosing journalistic investigation as the prime embodiment of high-quality journalism, providing a broad perspective on the topic.

Resuming the debate on the differences between investigative journalism and day-to-day journalism, which still creates rifts among the journalistic class, but also within academia, this article dismisses the all-encompassing view that all journalism is investigative.

By assessing the impact of external factors, such as the market and technology, on the matrix of the investigative journalism concept, this analysis seeks to identify potential solutions that can sustain the *watchdog* role associated with investigative journalism.

As such, this paper delves into the new frontiers of investigative journalism, simultaneously highlighting the potential of digital technology to keep powers under scrutiny in an increasingly complex world; create collaborative networks among journalists that expand the scope and enhance the impact of published stories; foster partnerships between media organisations, nonprofit organisations and universities; and find long overdue solutions to ensure that investigative journalism reaches peripheral territories, where it still has an utterly marginal presence.

Keywords

investigative journalism, quality journalism, day-to-day journalism, technology, market

Novas Fronteiras do Jornalismo de Investigação: Do Lobo Solitário à Alcateia

Resumo

Este artigo recorre à revisão bibliográfica para percorrer 100 anos de história do jornalismo de investigação, fixando-se no conceito, em toda a sua amplitude, ao eleger a investigação jornalística como a expressão mais direta do jornalismo de qualidade.

Retomando a discussão sobre as diferenças entre jornalismo de investigação e jornalismo quotidiano, que, ainda hoje, cria clivagens no seio da classe jornalística, mas também na academia, este artigo rejeita a visão abrangente de que todo o jornalismo é de investigação.

Avaliando o impacto dos fatores externos, como o mercado e a tecnologia, na matriz do conceito de jornalismo de investigação, esta análise tenta identificar soluções que contribuam para que a função de *cão de guarda*, atribuída ao jornalismo de investigação, permaneça ativa.

Nesse sentido, este artigo aprofunda as novas fronteiras do jornalismo de investigação, salientando o potencial da tecnologia digital para, simultaneamente, manter sob escrutínio os poderes num mundo cada vez mais complexo; criar redes de colaboração entre jornalistas que alarguem a escala das matérias publicadas e reforcem o impacto; promover parcerias entre órgãos de comunicação social, entidades não lucrativas e universidades; encontrar soluções, que tardam, para que o jornalismo de investigação chegue aos territórios periféricos, onde ainda tem uma expressão absolutamente residual.

Palavras-chave

jornalismo de investigação, jornalismo de qualidade, jornalismo quotidiano, tecnologia, mercado

1. Introduction

This article explores the classic concept of investigative journalism, emphasising what sets it apart from everyday practice and how digital technology has promoted its expansion, adding new challenges to journalism and the investigative journalist without alienating the concept matrix. Within a market-driven environment, this reflection also analyses how investigative journalism endures, supported by new business models and new production and distribution methods.

The crisis of sustainability in the media, triggered by digitalisation and further exacerbated by the 2007 burst of the mortgage market bubble in the United States, has, as several authors recognise, led to the disintegration of the journalism business, causing newsrooms cutbacks, salary reductions and closure of journalistic platforms worldwide (Birnbauer, 2019; Cagé, 2016; Hoxha, 2019; Jack, 2006; Starkman, 2014; Starr, 2011). This "meteorite", as Ramonet (2011, p. 11) puts it, has caused a radical shift in the entire "media ecosystem", journalistic quality being the first victim, as underscored by several analyses (Cagé, 2016; Kovach & Rosenstiel, 2010; Tong, 2022).

Navigating the inherent challenge of defining the concept of quality, especially if applied to journalism (Marinho, 2015), several authors draw a direct correlation between quality and investigative journalism[1] (Antelava, 2018; Birnbauer, 2019; Coelho & Rodrigues, 2020; Starkman, 2014; Tong, 2022). Concurrently, other scholars emphasise that the decline in quality caused by the sustainability crisis has had a particularly significant impact on investigative journalism (Burgh, 2021; Cagé, 2016; Hamilton, 2016; Hoxha, 2019; Jack, 2006; Knobel, 2018).

[1] In this article, we analyse the broad scope of the investigative journalism concept, encompassing the neighbouring concepts of accountability journalism watchdog journalism, in-depth reporting/long-form exposé, public interest journalism as Bill Birnbauer (2019) describes it, highlighting the analogy many authors have drawn between investigative journalism and democracy (p. 57).

Dean Starkman (2014), prolific on the subject, describes the disappearance of dissenting voices in newsrooms and emphasises the permanent cuts that the "disintegration of the financial underpinnings of the news business" (p. 246) has caused in investigative journalism. Disinvestment in investigative journalism "could not have come at a worse time" (p. 246). "The watchdog didn't bark" (p. 4), he concludes.

Bill Birnbauer's (2019) analysis seems to point in the opposite direction. To prove his thesis, the Australian author draws on several studies, including a study by Knobel (2018), where the author, responding directly to Starkman, provides evidence that "the watchdog still barks". Drawing on his interpretation of these studies, Birnbauer (2019) concludes that editors enforced "the culture and values of professional journalism" (p. 52) by protecting investigative reporting and teams of journalists.

We will see below that these two seemingly opposing perspectives share a common ground.

The omnipresence of the war in Ukraine serves as a backdrop to delineate the underlying thought processes that shape this article. It underscores not only the varying paces of journalism but also highlights the new challenges that journalism must confront to participate in the preservation of democracy (Sarmina, 2018).

As Natalia Antelava (2018) points out, day-to-day journalism is "disposable" and "not designed for staying on a story" (p. 220). The war in Ukraine, elevated to daily news status since 24 February 2022, disrupts this universal logic.

In war, an environment shaped by propaganda and fake news, the spread of amputated truths is fast and difficult to control and journalists, as Medea Benjamin (2014) acknowledges, tend to be more *lapdogs* than *watchdogs* of the government leading to the suppression of dissenting perspectives.

The texts Martha Gellhorn (2007) wrote about the Vietnam War were never published in national newspapers. The reporter needed the British *The Guardian* to publish and counter the "official American version of the war" (p. 448).

During the 1960s and 1970s, the State's control of information allowed it to have "control of reality" (Sarmina, 2018, p. 193), which facilitated the exclusion of Martha Gellhorn from the chorus of official voices that aligned with a particular vision of the Vietnam war. However, in the digital age, the control of information flows requires much more complex tools, that "the more invisible such instruments are, the more powerful they are" (p. 194).

The digital age will have to use the formula the analogue age tried to use to tune out the chorus of the official narrative forged in propaganda and disinformation. In the last century, Martha Gellhorn (2007) relied on "serious, careful and honest journalism... as a means of (...) getting the facts straight" (p. 420). In the digital age, Jingrong Tong (2022) contends that when "disinformation and fake news further damage the health of democracy", "we need quality journalism more than ever" (p. 170). She adds that "this need" is one of the primary reasons that journalism is "obliged to survive and revive" (p. 170).

We are exactly at the point of survival, Barbie Zelizer (2017) warns us: "with journalism's exhaustion, comes the potential for journalism's height and rebirth" (p. 7).

In the digital age, the rebirth of "quality journalism, such as investigative journalism" (Tong, 2022, p. 171), however, requires journalists to have "new skills, but also requires an ability to think independently and critically" (p. 138). Indeed, Oliver Hahn and Florian Stalph (2018) acknowledge that "investigative journalism is heavily affected by digital transformation" (p. 2).

2. Investigative journalism

The classic definition of investigative journalism has stood the test of time. Even though the original concept has broadened its scope due to market and technological influences, demanding new skills from investigative journalists and imposing new challenges, the concept's matrix remains. The classic definition of investigative journalism, based on the desire forged in the late 19th to early 20th century, from the contribution of muckrakers[2] to put the powerful under scrutiny, remains essentially unchanged and has been endorsed by numerous authors throughout different periods (Anderson & Benjaminson, 1976; Aucoin, 2005; Birnbauer, 2019; Burgh, 2021; Hamilton, 2016; Houston & Horvit, 2021; Kovach & Rosenstiel, 2010; Randall, 2016; Starkman, 2014; Tong, 2022)[3].

The *Oxford Dictionary of Journalism* (Harcup, 2014) encapsulates the essence of investigative journalism's *watchdog* role, defining it as "reporting that sets out to discover something that somebody wishes to remain a secret" (p. 144). The mission of an individual journalist or a team of journalists involves "detailed and time-consuming" investigative work in "inquiring into some kind of alleged wrongdoing" (p. 144).

This definition should be complemented with a description of specific tasks investigative journalists undertake, within ethical guidelines, to uncover hidden information, determining who, when and where they hide, why they hide and how they hide.

2.1. Investigative Journalism and Day-to-Day Journalism

In 1976, in the aftermath of the Watergate affair and the two-year spurt of revelations about the 1972 break-in at Democratic Party headquarters, investigative journalists David Anderson and Peter Benjaminson (1976) published the first book entirely devoted to investigative journalism.

The book introduces an argument challenging the distinction between investigative journalism and everyday journalism: "any reporter who does the job well is already part investigator. Those who merely report the public words of people powerful enough (...) to attract the media's attention are publicists or stenographers; they are not journalists" (Anderson & Benjaminson, 1976, p. 3).

[2] The term was coined by President Teddy Roosevelt in 1906 and is related to the act of "digging in the muck for sensationalistic stories" (Zelizer & Allan, 2010, pp. 74–75) and portrays the restricted group of journalists critical of power who, at the beginning of the 20th century and until the advent of the First World War, denounced, above all, cases of corruption. Despite sharing similarities with advocacy journalism and deviating from literary canons, muckrakers are closely associated with the origins of investigative journalism (Hoxha, 2019; Starkman, 2014).

[3] The reference is not comprehensive and only aims to highlight structuring moments through the perspectives of influential authors in journalism studies. Hahn and Stalph (2018), Hoxha (2019), Lück and Schultz (2019), Knobel (2018), Starr (2011), Zelizer and Allan (2010) share the same approach.

Indeed, many journalists (Aucoin, 2005)[4] and certain scholars (Lanosga et al., 2015)[5] have put forth the notion that all journalists are guided by an inherent *watchdog* instinct, suggesting that there are no differences among their profiles and levels of engagement with the journalistic object. That is not the stance taken in the present discussion.

David Randall (2016) succinctly captures the boundary between investigative journalism and day-to-day journalism in one sentence: "investigative reporting starts at the point where the day-to-day work stops" (p. 128). The news, the raw material of day-to-day journalism, has tight deadlines, and publication cannot stretch beyond the demands of the ephemeral. Randall underlines just that, "a point" at which the journalist has "to stop and report" what has found or not found (p. 128). In turn, investigative reporting, functioning at a different pace, "does not accept the secrecy and the refusal of officials... It finds out for itself" (Randall, 2016, p. 128).

Randall's (2016) observation suggests that investigative journalism does not cancel out day-to-day journalism. The two approaches complement each other, embodying journalism's noble mission to serve the public.

Dean Starkman (2014) also establishes a clear distinction between investigative journalism, which the author classifies as *accountability reporting* and day-to-day journalism, *access reporting*. However, the author's line of argument reflects a clear overestimation of *accountability reporting* while pointing to a set of access reporting practices that distort journalism's framework of values. Dean Starkman (2014) breaks the link and the complementarity between the two paces of journalism, whose grounds have already been emphasised here:

> access reporting tells readers what powerful actors say, while accountability reporting tells readers what they do (...). Access reporting tends to talk to elites; accountability, to dissidents (...). Access tends to transmit orthodox views; accountability (...) heterodox (...). In business news, access reporting focuses on investors' interests; accountability, on the public interest (...). Access (...) its stories are, if not easier, certainly quicker to produce and rarely confrontational (...). Accountability reporting is forever marginal, a cost center... time consuming, stressful, and enemy making... Put simply, accountability reporting – the watchdog – got the story that access reporting missed... Without accountability, journalism has no purpose, no focus, no point. (pp. 10–11)

[4] In the list of journalists who argue that all journalism is investigative journalism, James Aucoin (2005) highlights Carl Bernstein and Robert Maynard, citing public statements that the two *Washington Post* journalists made in the mid-1970s. Aucoin also highlights the positions of Richard Dudman of the *St. Louis Post-Dispatch* and Jonathan Kwitny of the *Wall Street Journal*, expressed in the same period.

[5] In a study published in 2015, the result of two surveys with the same type of questions, given to 1,900 American journalists (1,080 day-to-day journalists, 861 investigative journalists) in late 2013, Lanosga et al. (2015) concluded there are differences between investigative journalists and day-to-day journalists.However, these differences mainly reflect the roles each group believes they have in the trade. The authors challenge the fact that journalists and scholars assume that investigative journalists form a "breed apart" without this claim being legitimised by academic studies. This study, as the authors argue, addresses this "lapse". Analysing the responses, the study's authors admit that investigative journalists, because they are more likely than everyday journalists to use "controversial practices", have "lower ethical standards" than other journalists, which, the authors conclude, are "contrary to suggestions in the literature" on the subject. The authors also note what they consider to be an "intriguing consequence": "while investigative journalists are generally more adversarial toward public officials than journalists overall, they are also more likely to work" alongside them (Lanosga et al., 2015, pp. 2, 20).

2.2. The Topics That Trigger Investigations

Investigative journalism is frequently linked to uncovering malpractices within public administration involving public servants, particularly active politicians or individuals who have held significant public roles. The most prominent thematic range of investigative journalism also encompasses the exposure of misconduct within private companies and their managers, particularly those with close professional connections to the Government. It further extends to foundations, their managers, and other civil society entities, especially those receiving public funding.

The choice of the topic depends mainly on three factors: the reporter's originality and proactivity (Hamilton, 2016; Houston & Horvit, 2021; Hunter, 2018; Novais, 2022; Randall, 2016), the associated costs of the investigation (Hamilton, 2016), and the potential impact that *uncovering* the topic may yield.

In assessing the impact of investigative stories, Hamilton (2016) analysed the career of Pat Stith, an investigative journalist based in North Carolina. The study concluded that in four decades of work, Stith's investigative reports generated $4,700,000 in community benefits. Thus, the conclusion drawn by the US scholar urges political authorities and civil society to prioritise the reinforcement of investigative journalism:

> each dollar invested (...) in investigative work can yield hundreds of dollars in benefits to society when public policies change. Investigative reporting costing thousands of dollars can generate millions in benefits spread throughout a community. (Hamilton, 2016, p. 279)

Andrew Lehren (2018) takes the example of Pat Stith to emphasise the relevance of the impact of investigative journalism. Stith's alliance with technology has allowed him to expand the scale of his stories and their impact.

The social profit associated with such work, when it leads to change, reforms outdated laws, exposes corruption, and uncovers criminal networks, is not directly matched by financial profit. However, as Philippe Meyer (2004) acknowledges, the investment in quality investigative journalism is a long-term venture, as "quality produces business" (p. 79).

The impact of an investigation dictates that the journalist does not abandon the topic after publication or exposure. They must follow the story's lead and investigate new leads generated by the impact (Hamilton, 2016; Houston & Horvit, 2021; Hunter, 2018).

2.3. The Challenge of Uncovering

Because it is more complex and original than breaking news or beat journalism, it takes longer, it upsets people, and it is more demanding of official responses (Birnbauer, 2019); because investigative journalists face greater ethical dilemmas, have greater transparency concerns, refer to more documents, spend more time producing stories than day-to-day journalists (Houston & Horvit, 2021), investigative journalism is "a higher form of journalism" (Coelho & Silva, 2018; Knobel, 2018).

The investigation challenge is too demanding for the journalist for the reasons outlined. "To stir up a hornet's nest", recognise Oliver Hahn and Florian Stalph (2018, pp.

2–3), has costs. There is a permanent conflict between those who investigate and those who are investigated and who strive, by creating “obstacles”, to avoid the pressure of the investigation. It is up to the journalist to resist, “to fiercely overcome” these obstacles.

Jingrong Tong (2022) summarises the nature of this conflict — “investigative journalism pits the press against power” (p. 34) — and this evidence underpins a paradox noted by two authors in an analysis spaced 12 years apart. James T. Hamilton (2016) and Érik Neveu (2004) emphasise that investigative journalism is highly esteemed by both the public and journalists themselves, yet it is under-practised.

The time that investigative journalism requires, the uncertainty of the outcome and the costs associated with more complex investigations may not be the only justifications for the minimal expression of investigative journalism. Tong (2002) complements this assumption. The author writes that in an environment dominated by “severe financial losses”, journalistic media “may not be able to afford to damage such relationships” (p. 34).

Coelho and Silva (2018) and Houston and Horvit (2021) use the same expression — “bulletproof evidence” — to stress the need for the published story to withstand the pressure of vested interests, which the investigation aims to uncover, but also the inevitable lawsuits that this reveal will eventually raise.

In the same vein, Bill Kovach and Tom Rosenstiel (2010) associate investigative reporting with the imperative to attain “a higher standard of proof” while also maintaining “high levels of transparency” and providing “great detail about sources and methods” employed to demonstrate the report’s “independence” (p. 72).

2.4. Under the Primacy of Ethics

The most distinctive task involves a stronger commitment to ethics and careful reflection on situations that can create doubt in the public eye. Such a commitment forges “bulletproof evidence” and enhances transparency. David Randall (2016) notes, “ethics are not some optional extra but are integral to every aspect of the job” (p. 171).

Thus, Hoxha (2019) proposes that the investigation be subjected to “layers of verification of facts” (p. 1), a task that Houston and Horvit (2021) categorise as “line-by-line checking”, which requires the journalist to “check out each fact” and to go back “to the original documentation” and “interviews”, “the reporter checks quotes”, identifying “logical inconsistencies or information gaps” (p. 104).

The most demanding ethical commitment also requires investigative journalists to be particularly careful in their relationship with sources. Preserving a distance from the source, decoding from the outset what motivates them to make a certain revelation, limits the risk of the journalist allowing themselves to be instrumentalised, becoming hostage to the interests of that source (Anderson & Benjaminson, 1976).

Using anonymous sources is another decision that can compromise the transparency of the investigation. Houston and Horvit (2021) recommend that anonymous sources should only be used after the relevance of the information has been considered and all alternative options available to the journalist have been exhausted, such as trying to verify the information with another person with real knowledge of the matter, or ensure it can be confirmed in official documents.

3. The Particular Personality of the Investigative Journalist

Amidst the paradoxes inherent in investigative journalism, James Aucoin (2005) is willing to tackle yet another one. In a detailed analysis of the evolution of the investigative journalism concept from 1960 to 1975, Aucoin cites one of the journalists who has achieved legendary status in the history of journalism, Carl Bernstein. In 1975, Bob Woodward's partner in the Watergate revelations publicly refused the title of investigative journalist: "all good reporting really is based on the same thing, the same kind of work" (p. 85), "I've always approached especially long pieces by digging into things… I don't think you do such stories any differently" (Aucoin, 2005, p. 108).

Alicia Shepard, who in 2007 published a detailed account of Bernstein's and Woodward's journey following their Watergate coverage, recognises that "three decades after Watergate", the two names "are still synonymous with the gold standard in investigative, in-depth reporting" (p. xiv). Shepard's (2007) description shows that Bernstein's position on investigative journalism differed from the one he expressed in 1975. The biographer recalls that, during the Bush administration, Bernstein publicly demanded "a Watergate-like investigation" (p. xv).

In the great detail she puts into the characterisation of Carl Bernstein's journalistic personality, Alicia Shepard (2007) reproduces the opinions of co-workers, editors, and, in everyone's voice, the distinctive traits that Bernstein devalued in 1975 stand out: "an unstoppable desire to be at the center of things, a ferocious curiosity… bright, intense, and aggressive" (pp. 21–22), which, from the outset, accentuates the adversarial position usually associated with the investigative journalist (Lanosga et al., 2015; Novais, 2022).

David Anderson and Peter Benjaminson (1976) discuss the particular personality of the investigative journalist. The authors consider that "uncovering information, particularly information that has been deliberately concealed, requires a certain type of personality", characterised by "extraordinary patience" and an "extremely high threshold of boredom" (p. 3). In 1976, these authors established a distinction that is still replicated today in textbooks dedicated to the study of investigative journalism. "What separates the investigator from other reporters is a willingness to dig" (Anderson & Benjaminson, 1976, p. 4)[6]. More than 40 years later, Houston e Horvit (2021) emphasised exactly the "penchant for digging" (p. 3) as the watermark of the investigative journalist.

3.1. Using the Privilege of Time Wisely

The time that journalists "who had survived the cutbacks" increasingly spend on "superficial stories" (Birnbauer, 2019, p. 44), developing an almost mechanical work, like

[6] In 1975, a year before Anderson and Benjaminson's joint work, we find the expression "digging specialists" quoted by Walter Lubars and John Wicklein (1975) in the volume they organised at the Watergate conference at Boston University.

the "hamster wheel" (Starkman, 2014, p. 246), is, in the newsrooms of the digital age, a privilege. Time allows digging and widens the gap between the day-to-day journalist and the investigative journalist; it is an achievement and a responsibility.

Pat Stith, an investigative journalist for four decades, was given "the gift of time" (Hamilton, 2016, p. 278). The *News Observer* journalist, whose career James T. Hamilton (2016) analysed, was able to construct "a happy combination": his reporting generated "financial returns", "professional pride", and "social responsibility" (p. 278). Stith managed his time wisely, condensing, in that management, the main traits that set an investigative journalist apart: "get training", as one of the pioneers of data journalism, "fight for records, analyze data, prepare for interviews, check and verify, publish frequently, and to do follow-ups that generate change" (Hamilton, 2016, p. 278). However, to the time the *News Observer* gave him, Stith added his own time, "going beyond the normal payday to spend nights and often weekends to gather evidence and confirmations" (p. 278).

3.2. Doubt and Method

Stith was guided by "a mantra", doubt: "I doubt that... the phrase pops up frequently – in interviews about his work" (Hamilton, 2016, p. 208).

John Pilger (2005) also encourages scepticism in the investigative journalist. Bill Kovach and Tom Rosenstiel (2010) recommend that reporters always start a story as if they know nothing, cultivating a permanent "sceptical knowledge" (p. 30). David Randall (2016) argues that being a "sharp and sceptical questioner" is an attribute of the "universal journalist" (p. viii). Houston and Horvit (2021) recommend the investigative journalist "healthy scepticism" (p. iv). David Anderson and Peter Benjaminson (1976) characterise the investigative journalist as one who distrusts "human nature" because, they add, "someone, somehow, is working against the public interest" (pp. 3–4).

While doubt sets the story's pace, from the unrest that launches it to the moment it is published or aired, curiosity fuels it. Curiosity mirrors the "desire to know the story behind the story" (Houston & Horvit, 2021, p. iv). David Randall (2016) believes that the best journalists display a "compulsive curiosity" (p. 279) that urges them to know more and more about the subject they are investigating. The information they amass on their journey towards in-depth knowledge of the subjects they cover requires investigative journalists, as Bill Kovach and Tom Rosenstiel (2010) see it, "such methods" are "a way of disciplining their curiosity" (p. 153). Only then, the authors conclude, can journalists "always go further in the process of questioning" (Kovach & Rosenstiel, 2010, p. 153).

3.3. Persistence, Intelligence and Credibility

Digging deeper into the *how* requires "personal engagement" from the reporter (Hunter, 2018, p. 9), commitment, dedication, many hours of research, sharp thinking, and intellect. As Randall (2016) notes, "I have never met a very good or great reporter who was not also highly intelligent, reflective and thoughtful". And those, "are generally more meticulous in their reporting than most journalists" (pp. 277–278). "Exceptional journalists" cultivate a "subtle signature" that pushes them to dig deeper in their verification work (Kovach & Rosenstiel, 2010, p. 153); "the voice and words of these journalists reinforce the credibility of the investigation" (Novais, 2022, p. 313).

This commitment to journalistic knowledge reinforces the usefulness of the verb "dig", already mentioned here, and associates the investigative journalist with other traits that separate them from the rest. Starting with persistence. David Randall (2016) states that this "determination" is what allows them to move forward, overcoming the "inevitable frustrations" (p. 131).

Anderson and Benjaminson (1976) add that "the challenge of unraveling" (p. 4) encourages the investigative reporter to persist and not give up. "To uncover concealed information" (p. 5) — enduring the hostility of those targeted and the stonewalling of those who want the information to remain concealed create — the investigative journalist must go to great lengths in this exercise of *uncovering*.

3.4. Subversion

John Pilger (2005) and Dean Starkman (2014) associate investigative journalists with a less obvious trait, subversion, which places them in marginalised territory. The authors do not use the word, but the examples they highlight seem to associate investigative journalists with a certain defiance, a certain contempt for the rules and a willingness to shake up the dominant view.

In his compilation of examples in *Tell Me No Lies*, Pilger (2005) highlights journalists who refuse to become "part of a propaganda apparatus" and reject the role of being "spokesmen of the spokesmen". Instead, they endeavour to alert their readers "to vital hidden truth". These journalists cultivate a certain "insurrection against the rules of the game" (pp. xv–xvi).

Meanwhile, Dean Starkman (2014) details the role of Mike Hudson, a fringe journalist and society reporter for a Pittsburgh weekly, in covering the events that triggered the United States mortgage market crisis. In Starkman's (2014) analysis, Hudson was one of the few who exposed Wall Street, overcoming the constraints of the official view: "the business press in general was guilty of missing the moment" (p. 287). When he was hired by the *Wall Street Journal*, Hudson, like "a basketball player playing out of position", never adapted and resigned (Starkman, 2014, p. 271).

4. The New Frontiers of Investigative Journalism

The defining influence of digital technology on journalism at large, particularly investigative journalism, suggests we should go back to *The Elements of Journalism*, the first edition of which Bill Kovach and Tom Rosenstiel published at the turn of the century. Revisiting this seminal work six years later, the authors elaborate on the effects of the digital revolution on journalism while retaining its essence:

> the purpose of journalism is not defined by technology, nor by journalists or the techniques they employ (...) are defined by something more basic, the function news plays in the lives of people... The face of journalism has changed, indeed, its purpose has remained remarkably constant. (Kovach & Rosenstiel, 2007, pp. 11–14)

Focusing exclusively on the influence of digital technology on the "evolution of investigative journalism", Abit Hoxha (2019) recognises that "the role of the investigative journalist has changed during the last decades, although verification and deeper understanding" of the topics being investigated "will always remain at the core of investigative journalism" (p. 1).

The premise is echoed by other authors who have studied the new frontiers of investigative journalism. Oliver Hahn and Florian Stalph (2018), for example, argue that new investigative techniques and devices "push the boundaries" of journalism and expand the traditional techniques of journalistic reporting, but "traditional journalism remains the pillar of news production" (p. 89).

Jingrong Tong (2022) also notes that data help tell stories but do not tell them alone. "Data as a vital supplement to traditional human news sources" (p. 62), as data journalism and traditional journalism are combined in a "continuum" in which journalists "adopt computer tools and algorithms to collect, store, clean and analyze data and to present their findings in such a way that it helps to tell stories" (Tong, 2022, p. 62).

Although, in a clear "business mistake", technology, at the turn of the 20th to the 21st century, was seen by many as a panacea for all journalism problems (Downie & Schudson, 2009, p. 16), two decades later, technology smoothly occupies the place of a tool that empowers and enhances journalism, without jeopardising the values that structure it. Hugo de Burgh (2021) emphasises that "journalists have to treat data like any other source of information (...) with the same level of scepticism" (p. 3). According to the author, the challenge for data journalists is therefore "obvious": "living up to the levels of impartiality, evidence and fact checking of the best journalists of the pre-digital past" (Burgh, 2021, p. 6).

4.1. The Challenge of Technology

To keep the mission of inspecting the actions of the powers, the digital era investigative journalist must acquire new skills and take on new roles. Accessing digital sources and knowing how to capitalise on the data they contain — giving the data a journalistic meaning, building a story with the potential to create impact from that work — requires "hybrid journalists", who "combine journalism practice with methodologies drawn from sciences and innovative technologies" (Hahn & Stalph, 2018, p. 7).

This *digital hybridity* is an expansion of the concept of precision journalism, coined by Philip Meyer in the 1970s, which essentially applied social science methodologies to journalism. In the digital age, this alliance is extended to computer science and statistics (Hahn & Stalph, 2018; Tong, 2022).

The technology that provides the means to filter and decrypt a volume of data with the gigantic dimension of the leak that the International Consortium of Investigative Journalists dealt with in the Panama Papers[7] is the same that made it possible to build the network that brought together the 370 reporters scattered in different parts of the world, bridging different cultures, different languages and providing each reporter with the protective shield that, especially in regions of the globe affected by attacks on freedom of expression, made it possible to dilute the risk for all the journalists involved (Coelho & Rodrigues, 2020; Lück & Schultz, 2019; Sambrook, 2017).

Technology, which allows journalism to cross borders, gain scale and achieve a global impact, is, however, the same technology that feeds the security paranoia of states, simultaneously creating bubbles of information protection — which make access to essential materials difficult or even impossible — and watching, monitoring, at all times, any citizen, even if this tapping is merely an expression of uncontrolled power.

Collaborative investigative journalism is undergoing a "technological dilemma" (Coelho & Rodrigues, 2020, p. 143), which Bell and Owen (2017) describe in these terms: "the very reasons the State wants to tame, penetrate, and control the digital universe are the same reasons that make it an instrument of liberty" (p. 8).

The dilemma we discussed gained particular relevance with the Edward Snowden revelations, which had a double effect on investigative journalism. On the one hand, it made it stronger — by empowering the creation of a network of journalists who investigated and revealed the leak, allowing the denunciation of the National Security Agency's massive surveillance to reach a global dimension, which weakened the US administration —, on the other hand, this revelation inaugurated a new era of security paranoia, with direct negative effects on investigative journalism: "*five eyes*[8] had the technology to snoop on journalists and their sources, a major revaluation of journalism tradecraft has begun" (Burgh, 2021, p. 4).

To regain the trust of sources, many investigative journalists, even realising that surveillance is everywhere, have resumed direct contact, while others have learned encryption techniques. The financially stronger media organisations, where investigative journalism is prominent, have set up digital security training for journalists, and journalists have extended this training to their sources. However, the realisation that information security is no longer an absolute given has set in: "the Snowden Affair turned upside down the work of journalists" (Posetti, 2018, p. 252).

[7] The Panama Papers investigation, led by the International Consortium of Investigative Journalists, brought together 370 journalists from 80 countries with 25 different languages and 100 media organisations. The group worked on a leak of 11,500,000 documents with multiple layers of encryption. The investigation exposed the connections of hundreds of politicians and public figures to 250,000 offshore companies. The journalists worked for a year, following strict rules set by the International Consortium of Investigative Journalists, without any of them breaking the silence to which they were bound. The consortium published 4,700 articles (Burgh, 2021; Días-Struck & Cabra, 2018; Houston & Horvit, 2021; Hoxha, 2019; Tong, 2022).

[8] An alliance between the secret services of the United States, the United Kingdom, Canada, Australia and New Zealand.

4.2. The Challenge of Collaboration

Digital technology, associated with investigative journalism, has made it possible to strengthen collaborative journalism. In fact, collaborative projects have been identified since the 1970s. In 1976, at a time when long-distance communication depended on the telephone or letters, and the culture of the "lone wolve" (Burgh, 2021, p. 3) set the pace for investigative journalism in newsrooms, the *Arizona Project* brought together 40 journalists from 12 media outlets to pursue the investigation of journalist Don Bolles, murdered in Phoenix, Arizona (Houston & Horvit, 2021). The *Arizona Project* sent the clear message that "no one could kill a story by killing the reporter"[9] (Houston & Horvit, 2021, p. v). It was the inspiration for all the collaborations that followed, especially the one that, underpinned by data journalism, reinvented the concept of collaboration (Hoxha, 2019) and changed "the very anthropology of investigative journalism" (Burgh, 2021, p. 3) — the Panama Papers investigation we mentioned earlier.

Collaboration is based on what the International Consortium of Investigative Journalists categorises as "radical sharing" (Guevara, 2016). Networked reporters share the results of their findings at all times. Sharing is a challenge for journalists, especially those trained in a world of competition. Therefore, to be effective, sharing requires trust, the principle on which journalistic collaboration is based (Días-Struck & Cabra, 2018; Houston & Horvit, 2021).

4.3. The Challenge of Innovation

As the analogue era journalist has always faced, the data journalist faces the challenge of form. Houston and Horvit (2021), for example, consider it "a huge mistake" for investigative journalists to devote "little thought" to how to present stories: "there are countless examples of brilliantly reported work that (...) had little impact because the writing was impenetrable" and unable to captivate the reader (p. 77). The criticism is valid for the press but also television, multimedia or podcast.

In the digital age, investigative journalism is rising to the challenge of form by committing more to visual form in its various dimensions: video, interactive infographics, graphics, photography, and drone footage. As such, teams are expanding to include computer graphics experts, designers, photographers, programmers, visual journalists and drone operators (Kreimer, 2018; Radu, 2018).

"Innovation" is the key word for Natalia Antelava (2018). The CODA[10] platform, which she co-founded, results from two alliances: it merges different professional

[9] The same principle was echoed in 2018 with the launch of the *Daphne Project*, the consortium's first project created by Laurent Richard, Forbidden Stories. The *Daphne Project* brought together 45 journalists from 15 countries and 18 media outlets who continued the investigative work of Daphne Caruana Galizia, the Maltese journalist murdered in 2017 following her investigation into suspicions of alleged favouritism of the political power to a "mysterious" company, 17 Black, based in Dubai (Coelho & Rodrigues, 2020).

[10] Coda Story is a journalism start-up that connects multi-generational journalists, designers, technologists and editors. The platform aims to break out of the disposable news cycle by covering "crises in a way that creates a meaningful, cohesive narrative" (Antelava, 2018, p. 222).

categories and articulates traditional storytelling models — “traditional text, features and video” — to “distinct, innovative and inventive digital formats” (p. 223). CODA’s alliances are structured with the essential in mind: producing “high quality” content.

5. Conclusion

Investigative journalism, combined with digital technology, is adapting to the world’s growing complexity, embracing stories that transcend borders, creating networks of journalists who, from many places in many cultures, manage, with the story as the ultimate goal, to collaborate rather than compete. Teaming up with computer engineers, data science specialists, computer graphics experts, scholars and designers, investigative journalists are pushing the boundaries of the profession, storing, organising and filtering huge amounts of information, giving it meaning and shape, and building quality stories that generate impact.

Digital technology is also underpinning the creation of new business models in investigative journalism, from start-ups that investigate niche stories, some of them financially fuelled by crowdfunding (Antelava, 2018, p. 226), to the large non-profit entities that burst in the United States following the mortgage market crisis (Birnbauer, 2019, p. 64).

In the United States mainstream media, investigative journalism, as Birnbauer (2019) emphasises, and as we have previously described, has resisted the cutbacks that have affected day-to-day journalism. However, it has also endured because a not-for-profit sector, supported by foundations and individual donors, has rapidly emerged in the wake of the crisis. Fearing that the worst predictions about the future of investigative journalism would materialise, these protagonists have saved it in anticipation by giving hundreds of millions of dollars in donations to leading journalists who, having abandoned traditional media, have founded non-profit entities entirely dedicated to investigative journalism.

Thus, Birnbauer (2019) is optimistic about the future of investigative journalism in the United States of America, clearly dismissing the various threats that he identifies, which, in our view, are not to be dismissed.

The author also highlights that over 40% of donations are channelled to three national organisations — ProPublica, the Center for Public Integrity and the Center for Investigative Reporting (Birnbauer, 2019). While the future of these three organisations does not seem to be threatened, Birnbauer’s study casts significant doubt on the future of smaller non-profit organisations, which serve local areas and where, as the author notes, donors do not share the same values as those funding national organisations.

While Bill Birnbauer (2019) believes that in the future, national non-profits will be able to partner with smaller ones, boosting their vitality and making them less dependent on the uncertainties of local donors, the basis for this future is not described.

In the marginal territories of the United States, although the non-profit sector dedicated to investigative journalism does not seem to have the strength to resist, it is also true, as the author points out, that the second life of investigative journalism has not reached the North American metropolitan newspapers either (Birnbauer, 2019).

Following this approach, we can establish a parallel with other less vigorous markets, such as Portugal, for example, where the expression of investigative journalism is equally marginal (Coelho & Silva, 2021; Freitas et al., 2019).

The possibility that we are fuelling a two-speed world is real. On the one hand, the penumbra — suggested by the absence of accurate scrutiny of the exercise of powers reached by journalistic investigation — on the other, the permanent critical vigilance that feeds quality, rigorous, verified, in-depth information to those who can access it.

Investigative journalism may be living a second life, but there is a risk that this rebirth is not reaching everyone, and it should not be overlooked.

Translation: Anabela Delgado

Acknowledgements

This article is part of the project – *Estratégias de Inovação do Jornalismo de Investigação* – funded by ICNOVA, within the scope of exploratory projects.

References

Anderson, D., & Benjaminson, P. (1976). *Investigative reporting*. Indiana University Press.

Antelava, N. (2018). In-depth crisis reporting. In O. Hahn & F. Stalph (Eds.), *Digital investigative journalism* (pp. 217–229). Palgrave Macmillan.

Aucoin, J. (2005). *The evolution of American investigative journalism*. University of Missouri Press.

Bell, E., & Owen, T. (2017). *Journalism after Snowden: The future of the free press in the surveillance state*. Columbia University Press.

Benjamin, M. (2014, October 10). Why are the media playing lapdog and not watchdog – again – on war in Iraq? *The Guardian*. https://www.theguardian.com/commentisfree/2014/oct/10/media-lapdog-sold-war-in-iraq

Birnbauer, B. (2019). *The rise of nonprofit investigative journalism in the United States*. Routledge.

Burgh, H. (2021). Introduction. In H. de Burgh & P. Lashmar (Eds.), *Investigative journalism* (pp. 11–31). Routledge.

Cagé, J. (2016). *Saving the media: Capitalism, crowdfunding and democracy*. Harvard University Press.

Coelho, P., & Rodrigues, I. A. (2020). Rebuilding investigative journalism. Collaborative journalism: Sharing information, sharing risk. *Observatorio (OBS*)*, *14*(4), 135–157. https://doi.org/10.15847/obsOBS14420201748

Coelho, P., & Silva, M. T. (2018). O lucro social e financeiro do jornalismo de investigação. *Media & Jornalismo*, *32*(18), 73–94. http://hdl.handle.net/10362/63552

Coelho, P., & Silva, M. T. (2021). A resistência do jornalismo de investigação. In J. C. Correia & I. Amaral (Eds.), *De que falamos quando dizemos "jornalismo"? Temas Emergentes de Pesquisa* (pp. 25–53). Labcom.

Días-Struck, E., & Cabra, M. (2018). Uncovering international stories with data and collaboration. In O. Hahn & F. Stalph (Eds.), *Digital investigative journalism* (pp. 55–67). Palgrave Macmillan.

Downie, L., Jr., & Schudson, M. (2009, November/December). *The reconstruction of American journalism*. Columbia Journalism Review. https://archives.cjr.org/reconstruction/the_reconstruction_of_american.php

Freitas, A., Silva, A., & Amante, S. (2019). Re(a)presentações do jornalismo de investigação na voz dos profissionais de comunicação. In T. A. de Barros, S. Ferreira, P. Lobo, S. Morais, P. Rodrigues, F. Sobral, & L. Sousa (Eds.), *Ciências da comunicação: Vinte anos de investigação em Portugal* (pp. 663–684). SOPCOM/ Instituto Politécnico de Viseu.

Gellhorn, M. (2007). *A face da guerra* (C. Vitorino & I. Veríssimo, Trans.). Dom Quixote. (Original work published 1959)

Guevara, M. W. (2016, December 7). *Radical sharing: Breaking paradigms to achieve change*. International Consortium of Investigative Journalists. https://www.icij.org/inside-icij/2016/12/radical-sharing-breaking-paradigms-achieve-change/

Hahn, O., & Stalph, F. (Eds.). (2018). *Digital investigative journalism*. Palgrave Macmillan.

Hamilton, J. T. (2016). *Democracy's detectives, the economics of investigative journalism*. Harvard University Press.

Harcup, T. (2014). *Oxford dictionary of journalism*. Oxford University Press.

Houston, B., & Horvit, M. (2021). *The investigative reporter's handbook*. IRE.

Hoxha, A. (2019). Investigative journalism. In T. P. Vos & F. Hanusch (Eds.), *The international encyclopedia of journalism studies*. John Wiley & Sons. https://doi.org/10.1002/9781118841570.iejs0134

Hunter, M. L. (2018). *Story-based inquiry: A manual for investigative journalists*. UNESCO.

Jack, I. (2006). Introduction. In I. Jack (Ed.), *The Granta book of reportage* (pp. v–xiii). Granta Books.

Knobel, B. (2018). *The watchdog still barks*. Fordham University Press.

Kovach, B., & Rosenstiel, T. (2007). *The elements of journalism (completely updated and revised)*. Three Rivers Press.

Kovach, B., & Rosenstiel, T. (2010). *Blur. How to know what's true in the age of information overload*. Bloomsbury.

Kreimer, B. (2018). Drone journalism: Storytelling from a new perspective. In O. Hahn & F. Stalph (Eds.), *Digital investigative journalism* (pp. 91–103). Palgrave Macmillan.

Lanosga, G., Willnat, L., Weaver, D., & Hounston, B. (2015). A breed apart? A comparative study of investigative journalists and US journalists. *Journalism Studies*, *18*, 265–287. https://doi.org/10.1080/146167 0X.2015.1051570

Lehren, A. (2018). The rise of investigative data journalism. In O. Hahn & F. Stalph (Eds.), *Digital investigative journalism* (pp. 9–19). Palgrave Macmillan.

Lubars, W., & Wicklein, J. (1975). *The lessons of Watergate: A two day conference*. Boston University.

Lück, J., & Schultz, T. (2019). Investigative data journalism in a globalized world. *Journalism Research*, *2*(2), 93–114. https://journalistik.online/en/paper-en/investigative-data-journalism-in-a-globalized-world/

Marinho, S. (2015). *Jornalismo e formação em mudança: Modelos e construções na análise do caso português*. CECS.

Meyer, P. (2004). *The vanishing newspaper, saving journalism in the information age*. University of Missouri Press.

Neveu, É. (2004). *Sociologia do jornalismo*. Porto Editora.

Novais, R. A. (2022). Na linha de fogo: A adversatividade do jornalismo de investigação português na cobertura do populismo de extrema-direita. *Media & Jornalismo*, *22*(40), 301–318. https://doi.org/10.14195/2183-5462_40_15

Pilger, J. (2005). *Tell me no lies, investigative journalism and its triumphs*. Vintage Books.

Posetti, J. (2018). The future of investigative journalism in an era of surveillance and digital privacy erosion. In O. Hahn & F. Stalph (Eds.), *Digital investigative journalism* (pp. 9–19). Palgrave Macmillan.

Radu, J. (2018). Visual storytelling: Show, not tell? Show and tell. In O. Hahn & F. Stalph (Eds.), *Digital investigative journalism* (pp. 113–123). Palgrave Macmillan.

Ramonet, I. (2011). *L'Explosion du journalism, des médias de masse à la masse de médias*. Éditions Galilée.

Randall, D. (2016). *The universal journalist*. Pluto Press.

Sambrook, R. (2017). *Global teamwork: The rise of collaboration in investigative journalism*. Reuters Institute; University of Oxford.

Sarmina, A. (2018). Fact-checking as defense against propaganda in the digital age. In O. Hahn & F. Stalph (Eds.), *Digital investigative journalism* (pp. 193–203). Palgrave Macmillan.

Shepard, A. (2007). *Woodward and Bernstein, life in the shadow of Watergate*. John Wiley & Sons.

Starkman, D. (2014). *The watchdog that didn't bark: The financial crisis and the disappearance of investigative journalism*. Columbia University Press.

Starr, P. (2011). Goodbye to the age of newspapers (hello to a new era of corruption): Why American politics and society are about to be changed for the worse. In R. W. McChesney & V. Pickard (Eds.), *Will the last reporter please turn out the lights, the collapse of journalism and what can be done to fix it* (pp. 18–37). New York Press.

Tong, J. (2022). *Journalism in the data age*. SAGE.

Zelizer, B. (2017). *What journalism could be*. Polity Press.

Zelizer, B., & Allan, S. (2010). *Key words in news and journalism*. Open University Press.

Biographical Note

Pedro Coelho is an assistant professor at the Faculty of Social Sciences and Humanities, NOVA University Lisbon, and SIC's *Grande Repórter* (Great Investigative Reporter). He holds a PhD in media and journalism studies from NOVA University Lisbon. Integrated researcher at the NOVA Institute of Communication. He is the author of several major investigative reports and several scientific articles published in national and international journals on investigative journalism, academic training in journalism, reporting and neighbourhood journalism. He is the author, co-author and editor of six books, five academic and one of reportage. He has been honoured with several journalism awards, including two Gazeta de Televisão awards (2017, 2014). He has won two investigative journalism grants from the Fundação Calouste Gulbenkian. He is a founding member of the inter-school network (higher education) Repórteres em Construção. Pedro Coelho is president of the "V Congresso dos Jornalistas". He was a member of the executive and organising committees of the "IV Congresso dos Jornalistas Portugueses". He is a member of the International Press Institute and served on the General Council of the Union of Journalists until 2021.

ORCID: https://orcid.org/0000-0002-5734-4731

Email: pedrocoelho@fcsh.unl.pt

Address: Faculdade de Ciências Sociais e Humana - Av. de Berna, 26 C · 1069-061 Lisboa, Portugal

Submitted: 06/02/2023 | Accepted: 05/06/2023

Comunicação e Sociedade, vol. 44, 2023, e023016
https://doi.org/10.17231/comsoc.44(2023).4553

Local Journalists and Fact-Checking: An Exploratory Study in Portugal and Spain

Pedro Jerónimo
LabCom, Faculdade de Artes e Letras, Universidade da Beira Interior, Covilhã, Portugal
Conceptualization, data curation, formal analysis, funding acquisition, investigation, methodology, project administration, resources, supervision, validation, visualization, writing – original draft, writing – review & editing

Marta Sánchez Esparza
Departamento de Periodismo y Comunicación Corporativa, Facultad de Ciencias de la Comunicación, Universidad Rey Juan Carlos, Madrid, Spain
Data curation, formal analysis, investigation, methodology, resources, validation, visualisation, writing – original draft, writing – review & editing

Abstract

The lack of media attention given to various cities across different countries raises questions about the impact on their communities. When local journalism initiatives disappear, it creates space for alternative narratives that may not be as dedicated to holding those in power accountable. In these locations, polarisation intensifies, and civic engagement dwindles, leading to the depletion of democracy. However, these signs can persist even when journalistic coverage exists if it lacks thoroughness. Through in-depth interviews with journalists from 12 local media outlets in Portugal and Spain, this exploratory study delved into their perspectives and approaches to fact-checking. Time and resources available in the newsrooms, when scarce, lead to less fact-checking. It is also noteworthy that journalists in both countries demonstrate a near unwavering trust in official sources. That creates a deficit in the verification process when information originates from these sources. On the other hand, local politicians refrain from cooperating and actively impede journalists' efforts to fact-check through local media outlets, often driven by their vested interests.

Keywords

local journalism, journalists, disinformation/misinformation, fact-checking, quality of journalism

Jornalistas Locais e *Fact-Checking*: Um Estudo Exploratório em Portugal e Espanha

Resumo

A invisibilidade noticiosa a que estão a ser votadas várias cidades em diferentes países faz-nos questionar sobre as consequências para as respetivas comunidades. O desaparecimento de projetos jornalísticos de âmbito local leva a que o vazio deixado possa ser ocupado por outro tipo de realidades, menos comprometidas com o escrutínio dos poderes. A polarização cresce nestes lugares, a participação cívica diminui e isso terá como consequência o empobrecimento da democracia. Porém, estes sintomas podem existir mesmo com cobertura jornalística, quando ela não é feita de forma rigorosa. Neste estudo, exploratório, realizaram-se entrevistas em profundidade a jornalistas de 12 meios regionais de Portugal e Espanha, no sentido de analisar perceções e práticas sobre *fact-checking* (verificação de factos). Os fatores tempo e recursos disponíveis nas redações, quando em número reduzido, são cruciais sobretudo para que se verifique menos. Também registamos o facto dos jornalistas de ambos os países revelarem uma confiança quase cega nas fontes oficiais. Isto gera um déficit no processo de verificação, quando a informação provém dessas fontes. Por outro lado, os políticos locais não só não colaboram, como dificultam o trabalho de verificação dos jornalistas nas redações dos meios locais, com base nos seus próprios interesses.

Palavras-chave

jornalismo de proximidade, jornalistas, desinformação, *fact-checking*, qualidade do jornalismo

1. Introduction

1.1. Local Journalism in the Multiplatform Environment

Local journalism is a form of journalism produced within the community it serves, created by and for the people within that community (Izquierdo Labella, 2010). It requires the existence of a distinct identity rooted in a particular territory and a dedicated commitment from the local or regional environment. A communication pact with a territory that some authors call "proximity journalism" (Camponez, 2002; Jerónimo, 2015)[1]. Local information feeds this identity, equipping community members with the information required for active participation in that environment. Local media influence the public agenda of small communities, educate citizens about their leaders and different policies and positions and assist in the vital responsibility of holding those public representatives accountable.

However, local information consumption has changed a lot over the past decade, driven by the proliferation of platforms and the fragmentation of information sources (Morais & Jerónimo, 2023; Newman et al., 2021). A similar situation applies to the business models governing local news, which are under great pressure (Wiltshire, 2019). Services traditionally part of the local environment's value proposition — such as public service information, sports results, weather forecasts, and job offers, among others — are now being provided through platforms and websites of local organisations and companies. Platforms have become dominant in the information market, operating as intermediaries between news producers and consumers, collecting a huge amount of user data and mediating advertising sales. In this landscape, local media compete with entities that also serve as intermediaries for providing access to their own content and are no longer the exclusive providers of public service information. Their advertising model has proved less effective than that of platforms, which have detailed audience data and can offer advertisers targeted and much more specific campaigns.

[1] Other concepts are acknowledged, such as "local journalism" or "regional journalism". Although the original Portuguese version of this study used the term "proximity journalism" because it is the most widespread in countries such as Portugal, Spain or Brazil. This English version uses the term "local journalism", because it is the most widespread concept within the scientific community that communicates in English. For the same reason, we will consider "local media" in this English version.

Mobile access to all types of information, national and international, has also led to a significant decline in citizens' attention. According to Nielsen (2015), local news is now fighting a battle for attention in a digital landscape filled with myriad content easily accessible through smartphones. There are more and more media and technologies, but less local journalism. Such has been the case in countries such as the United States and Brazil, but also in Portugal, where "news deserts" have been expanding, that is, cities that no longer have any journalistic media or projects (https://www.atlas.jor.br; Abernathy, 2018; Jerónimo et al., 2022; Ramos, 2021). Social media have also prompted the creation of communities around certain topics. Local authorities and businesses use their networks and websites to provide news. These provide people with abundant information about their community outside of traditional media or mediums.

According to Ardia et al. (2020), a shift in how consumers seek information has been evident for over two decades. However, the media industry has been reluctant to change the business model that proved successful decades ago, thereby overlooking innovation policies. In addition to the earlier discussed fragmentation of news and the stagnant progress of newspapers, the conventional approach to handling local-level advertising has been supplanted by precision-targeted advertising overseen by major players like Facebook or Google. This shift has resulted in the detriment of the local media business. The option they provide to local advertisers to target their message recipients and optimise their investments has supplanted the conventional newspapers, radio, and television offers. These traditional mediums used to be the only channels for reaching the public. Platforms have very specific data on different audiences' tastes, preferences and needs, something of enormous value to advertisers that the media cannot offer (Morais & Jerónimo, 2023). "Local news organisations, which do not have the data, cannot offer the same level of targeted advertising" (Ardia et al., 2020, p. 13). Furthermore, as acknowledged by editors of local media themselves, sharing their news on platforms leads to the dilution of the news brand (Bell et al., 2017).

However, it is not just about one outdated business model being replaced by another. According to a study by the Tow Center for Digital Journalism at Columbia Journalism School, co-published by Blanquerna University, the larger issue is that social platform structure and economics incentivise the spread of low-quality content over high-quality material (Bell et al., 2017). "Journalism with high civic value — journalism that investigates power, or reaches underserved and local communities — is discriminated against by a system that favors scale and shareability" (Bell et al., 2017, p. 4). According to the authors of the same report:

> technology companies including Apple, Google, Snapchat, Twitter, and, above all, Facebook have taken on most of the functions of news organizations, becoming key players in the news ecosystem, whether they wanted that role or not. The distribution and presentation of information, the monetization of publishing, and the relationship with the audience are all dominated by a handful of platforms. These businesses might care about the health of journalism, but it is not their core purpose. (Bell et al., 2017, p. 8)

In the new digital ecosystem, publishers have lost control over the distribution of information, which is at the discretion of the algorithm used in each case by a given platform. Thus, they have the power to make an agency or medium more or less effective in disseminating and distributing its news. They are the new gatekeepers and decide what is or is not relevant to a previously segmented demographic. However, platforms do not prioritise addressing the problem of disinformation/misinformation or the informational configuration of local identity.

1.2. Local Media, Disinformation/Misinformation and Fact-Checking

The pandemic has accelerated the digital transformation process in which the regional press has been immersed for decades, forcing it to undergo a transition that was not deemed a priority in some countries (Galletero-Campos & Jerónimo, 2018). Meanwhile, journalists' professional routines have been changing to prioritise digital editions. In many European countries, newsrooms have established new dynamics, roles and processes to meet the needs of the digital audience (Jenkins & Jerónimo, 2021).

However, the crisis caused by the COVID-19 pandemic has also seriously damaged the sector. In the United States, a massive number of newspapers have closed (Ardia et al., 2020). In the last three years alone, 360 newspapers have closed (Edmonds, 2022). In Portugal, the Journalists' Union raised concerns about the worsening state of the regional press, as numerous newspapers suspended publication during the pandemic, following years of precarious existence (Jerónimo & Esparza, 2022). The same situation was experienced in countries such as Brazil. In Spain, media enterprises have chosen to implement Temporary Employment Regulation Files since the onset of the pandemic. These measures, endorsed by the Government to aid company sustainability, have resulted in salary reductions and reduced working hours. Remote work has additionally led to staff relocation, with journalists frequently working via phone and remotely, often distant from where news is produced.

Paradoxically, the pandemic has sparked an increased demand for information on news organisations' websites, even as these same companies have experienced significant revenue losses from events, advertising, and newsstand sales. In countries like the UK or Portugal, the public sector had to support the industry economically, notably local media (Sharma, 2021).

The shrinking of the industry and the disappearance of local newspapers are leaving many territories without outlets to engage in public debate on issues of local concern. Abernathy (2020) demonstrates in the report *News Deserts and Ghost Newspapers: Will Local News Survive?* that the pandemic has exacerbated the trend. In the case of the United States, over 1,500 out of the 3,031 counties are served by only one local newspaper, in most cases, a weekly publication. Over 200 of these counties have no media at all. Moreover, rural communities that have lost their local newspapers lack good broadband coverage, making it difficult to access information online easily.

In Spain, the provinces of Guadalajara and Cuenca in Castilla-La Mancha have witnessed the closure of their local newspapers (Galletero-Campos, 2018). Within that community, the percentage of the population that reads newspapers stands at a mere 7% (Asociación para la Investigación de Medios de Comunicación, 2018). Of the three provinces that make up the autonomous community in Aragon, two — Huesca and Teruel — also lack a local media outlet (Galletero-Campos, 2018).

In Portugal, during the pandemic, in 2020, the number of municipalities without any media registered with the Entidade Reguladora para a Comunicação Social (Media Regulatory Authority) was 57 (18.5%; Ramos, 2021). Meanwhile, this figure has increased — to 61 in 2021 (19.8%) —, prompting even the public involvement of the Associação Portuguesa de Imprensa (Lusa, 2022). The association raised concerns about the challenges arising from the information void, including the propagation of disinformation/misinformation. A more recent study (Jerónimo et al., 2022) reported that 166 of the 308 Portuguese municipalities (53.9%) are at some level of risk: categorised as deserted (devoid of any media outlet), semi-deserted media presence with sporadic coverage) or threatened (solely relying on one media outlet). This mapping only considered journalistic media and did not include other media types produced through citizen initiatives, excluding journalists' involvement. While acknowledging the potential presence of such realities within any territory within the identified "news deserts", they were not analysed. Nevertheless, Jerónimo et al. (2022) suggest further studies to explore how populations living in "news deserts" get information. That could also help to identify what kind of media are active in these territories.

The decline of the local press renders communities seriously vulnerable. Resources and reliable sources of local information are scarce commodities. Information is increasingly consumed through social media, where disinformation/misinformation easily proliferates. "In the vacuum left by the disappearance of local news sources, users are increasingly reliant on information sources that are incomplete, and may in fact be misleading or deceptive" (Ardia et al., 2020, p. 21).

As observed, platforms do not prioritise addressing the issue of disinformation/misinformation. They have sought assistance from authorities in this domain, believing they have no right to act as mediators of truth. Nevertheless, they did not want to stand still concerning an issue significantly undermining their credibility. So far, they have implemented content moderation measures by hiring the services of external technology consultants to remove toxic content (Satariano & Isaac, 2021). Additionally, they have partnered with fact-checking organisations as part of their third-party fact-checking program to combat "fake news"[2]. In 2018, Facebook launched the *Accelerator* project within the *Facebook Journalism Project*. The goal is to empower local news publishers to make their business model sustainable by enabling them to build online communities and increase their revenues from digital readers[3].

Interest in disinformation/misinformation has been on the rise within academic and institutional circles over the past decade (Said-Hung et al., 2021). However, the truth is that little has been studied and debated regarding the impact on the local public sphere (Torre & Jerónimo, 2023) and local media (Alcaide-Pulido, 2023; Jerónimo & Esparza, 2022). However, the effects of disinformation/misinformation are most keenly felt at a grassroots level, particularly on the local scene. The lack of journalistic scrutiny

[2] Facebook third-party fact-checking programme (Lyons, 2018).

[3] Guide to the Facebook Accelerator programme (Meta, n.d.).

on matters influencing community life impacts local economies and shapes citizens' perspectives promptly (Fernandes et al., 2021).

The fight against disinformation/misinformation depends, to a large extent, on the vitality of local journalism (Radcliffe, 2018). In small communities, local media journalists are the only journalists citizens see on their streets or towns. Trust is cultivated through close interaction and connection between the two. And forging this trust represents the biggest challenge for local journalism. A report from the International Press Institute underscores the significance of trust between citizens and journalists (Park, 2021). It drew insights from focus groups comprising over 35 journalists, editors, media managers, and entrepreneurs at the forefront of media transitions, fostering new perspectives in local media across Asia, Africa, Latin America, the Middle East, and Eastern Europe. The report analyses the cases of new digital start-ups and transitioning traditional media outlets in Ukraine, India, Zimbabwe, Peru, South Africa, Mexico, Venezuela, Paraguay, Kyrgyzstan, Israel, Palestine, Hungary, Jordan, Pakistan, Argentina and Guatemala. It focuses on links with local communities as the biggest opportunity for the future of local media. As the same report proves, the sustainability of local media requires their consistent ability to showcase their value to the communities they serve. That should be the main objective of the local press, to showcase through its work that it is on the same side as its community, thereby building a special relationship with its audiences.

As validated by the most recent *Digital News Report* (Newman et al., 2022), the local and regional press is positioned among the information products that citizens have the highest level of trust in, even amid the widespread erosion of trust in news media overall. Furthermore, considering the overall decline in citizens' engagement with news, the study underscores that 63% of respondents are interested in local news. Respondents also display interest in pandemic-related information (47%), international news (46%), culture (44%), science and technology (42%), politics (41%), environment and climate change (39%), security (37%), lifestyle (36%), health (35%) and sports (33%).

Citizens' enduring trust in and appreciation of local information persists over time, even amidst the discredit and waning interest registered in other subjects. Local media should harness and capitalise on this valuable asset. Their decline pertains to their business model rather than their credibility. That is where their main opportunity lies: fighting disinformation/misinformation can serve as a means to bolster citizens' confidence in the local press's role in this domain. Local media play a key role in the disinformation/misinformation war and can be demonstrated by regular verification, conducting in-depth reporting and exposing propaganda and misleading information (Jerónimo & Esparza, 2022).

One approach to address this challenge has been the emergence of fact-checking initiatives, primarily focusing on external verification, as internal fact-checking is typically carried out within newsrooms (Graves, 2016, 2018). The European Commission also expressed concern, allocating €11,000,000 in funding in 2021 for eight academic hubs and collaborating with other partners associated with the European Digital Media Observatory. The possibility that the public, that is, non-professionals or laypeople, can participate in fact-checking should not be overlooked (Allen et al., 2021). Considering the limited resources usually available in local media and the strong interest and civic engagement of certain citizens towards media, it is clear that they can play a role in the verification process as allies of journalists (including individuals with expertise in technology or other subjects that may lie outside the journalists' domain).

Fact-checking or verification involves the processes and practices of validating the accuracy of specific information that circulates through various media channels, including social media, rumours, or statements made by public figures. In today's digital ecosystem, disinformation/misinformation content is widely shared. Therefore, the verification process has become the primary responsibility of numerous journalists, even evolving into a specialised field due to the need to use advanced tools and methodologies. There are journalistic organisations solely devoted to fact-checking projects. The reality of local media is very different, as the lack of human and technical resources is a determining factor. Nonetheless, journalists employed by these media outlets also adhere to a verification process in their daily workflows, which involves checking whether the information they receive is true. They fact-check, however, at a less specialised level and before publication. That is the process we will refer to in this article when addressing the journalists' fact-checking activities. When undertaken as part of specialised projects, it is done after the fact (e.g., statements, social media posts, etc.).

It is also worth mentioning that just as users have the potential to amplify the impact of disinformation/misinformation content, they also hold the capability to assist in identifying and rectifying rumours, thereby collaborating with the media and journalists (Jerónimo & Esparza, 2022; Park, 2021).

2. Methodology

This exploratory study sought to assess how local media journalists in Portugal and Spain perceive and conduct fact-checking in the context of growing disinformation/misinformation. To this end, 12 semi-structured interviews were conducted with journalists with and without editorial responsibility in their respective newsrooms (Table 1). These interviews were all conducted online (via Zoom) between November 16, 2021, and March 18, 2022.

Designation	Gender	Age	Position	Medium	District/Region
PT1	M	61	Journalist	Radio*	Castelo Branco
PT2	F	50	Director	Cybermedia	Lisbon
PT3	F	58	Director	Cybermedia	Faro
PT4	M	57	Director	Newspaper*	Leiria
PT5	M	47	Director	Newspaper*	Castelo Branco
PT6	F	48	Director	Radio*	Viseu
ES1	F	45	Journalist	Radio	Seville/Andalusia
ES2	M	36	Delegate	Cyber media	Malaga/Andalusia
ES3	M	42	Director	Radio*	Santander/Cantabria
ES4	M	48	Journalist	Newspaper	A Coruña/Galiza
ES5	M	48	Editor-in-chief	Newspaper	Malaga/Andalusia
ES6	M	48	Director	Newspaper	Antequera/Andalusia

Table 1. *Data on the journalists interviewed*

Note. M (male) and F (female); *publishes in traditional and online formats

There was an effort to ensure diversity not only of the interviewees' gender but also of the nature and geographical origin of the outlets for which they worked. While complete achievement was not feasible, this objective was more successfully fulfilled in Portugal than Spain. The interviews, with a script of 22 questions, lasted 24 to 61 minutes. They focused on working conditions, content, sources and routines (including fact-checking), biases, and efforts to fight disinformation/misinformation. For the scope of this article, these interviews were used to: potential shifts in newsroom journalist numbers attributed to the pandemic; document journalists' perceptions of the evolution of disinformation/misinformation and the fact-checking process; document journalists' perspectives on any differences in the fact-checking process in traditional and digital media and, if so, the reasoning behind these differences; document journalists' viewpoints on fact-checking information from official sources, other media, fellow journalists, as well as social media users.

3. Findings and Discussion

The ongoing impact of the pandemic, which has ushered in numerous transformations in the structure of organisations, led us to investigate the developments within the newsrooms of local media outlets in Portugal and Spain. Thus, we noted that the pandemic did not bring changes in most cases; the number of journalists remained unchanged before and during the pandemic. On average, the sampled newsrooms comprised 7.6 journalists in the Portuguese case and 9.5 journalists in the Spanish context. This is one of the most relevant data collected from the interviews and reflects an image of resilience acknowledged in this sector, particularly in Portugal (Jerónimo, 2015). In this country, we find the only exception in the study: a newspaper's newsroom with an online presence with a staff of 12 journalists before the pandemic experienced a reduction to nine at the pandemic's onset and further decreased to five afterwards. Nevertheless, the departures were not prompted by redundancies or layoffs but by professional decisions. Among the seven cases, two journalists transitioned to another media outlet, so they remained in the profession, while the rest "realised with the pandemic that they wanted to change their lives" (PT6).

Overall, the blame for disinformation/misinformation is attributed primarily to social media, leading journalists in Portugal to emphasize the need for more fact-checking (Table 2). Furthermore, most respondents recognise the challenge of rapid and extensive publishing as a significant factor contributing to errors.

Interviewee	Statement
PT3	"Social media leads to a decline in verified information, posing a risk for journalists themselves"
PT5	"We are aware that the pace of news has accelerated to the point where there has been a temptation, at times, to skip stages. One of the crucial stages in journalism is verification, and the network that the online platform offers is something that a traditional print medium lacks"
PT6	"There is so much disinformation/misinformation now that one must check more than once. I even think there is more checking happening now"
ES3	"If the information is dubious and not a big deal, we choose not to publish it. We don't have verification resources like fact-checking companies, so we select a lot"
ES4	"We verify the news as before, but now we dedicate more time to it. Obviously, with fewer journalists, there is less verification, which leads to an overall decrease in product quality"
ES6	"There are fewer journalists in newsrooms and more in the offices of administrations, political parties and companies. Sometimes, the news comes from an official source, which is the most dangerous source. We've fallen into the 'copy and paste' trap, leading to people distrusting us. If you see the same headline across 10 different media outlets, it is because you are not doing verification"

Table 2. *Journalists' perception of the evolution of fact-checking*

On the other hand, journalists in Spain take verification as part of their daily work. Given the shortage of people, some local media outlets choose to refrain from publishing certain topics, particularly those they consider dubious. In such cases, they focus on developing unique and distinct content. We observed that Spanish local media are more selective to avoid errors. They consider the pressure of immediacy inherent in the digital environment and social media an impediment to thorough verification, thereby enabling the spread of inaccurate or biased information. Most of them also approach information from official sources with scepticism.

The journalists were divided when asked whether the verification was the same for publishing in traditional or online media (Table 3). This is evident among the Portuguese interviewees. While some perceive variations in verification methods, particularly in terms of time invested and quantity of sources used, others contend that there is no difference and advocate for a similar verification approach. In the latter scenario, we can see that the journalists mean rigour — meaning the time and resources invested by journalists should yield equivalent outcomes, regardless of the medium used for delivering the news.

Interviewee	Statement
PT2	"It is completely different (...). Online, because the publication speed has to be different, there's also a lot less verification"
PT3	"Online, the rules are obviously the same; it's no different for the journalist. However, there are moments when you get the sense of 'if I didn't get it right, I can always go and fix it!'"
PT4	"The way I see it, it should be done in the same way (...); we must provide the same dependable and rigorous information online"
ES2	"The pace we have in a digital newsroom is different from that of a printed publication, and often, we just cross-reference with a source or settle for what is fair"
ES4	"I don't put information on the web if I cannot publish it in print. It's not like it's the same afterwards, but it needs the same confirmation and accuracy. I think immediacy leads to more mistakes. Confirmation isn't as thorough as it should be. That didn't happen before, and we used to have several hours to confirm something"
ES6	"It's better for journalists to actively seek out their subjects rather than being limited by the pressure to publish a story quickly"

Table 3. *Fact-checking for traditional* versus *digital media*

Regarding the Spanish interviewees, there has been a shift in the dynamics of news production: newsrooms now focus more on the digital environment, aiming to enhance the quality of information. In this sense, it is apparent that journalists are engaging in a learning curve, particularly in their intention to avoid repeating past errors spurred by the pressure of immediacy. In certain instances, it is noticeable that the media outlet's reputation is given precedence, manifested through a focus on original topics and more in-depth content, rather than solely pursuing breaking news that might lack proper verification.

The emergence of fact-checking projects was partly a response to the recognition that the process of information verification within journalism and newsrooms was not meeting expectations. We asked our interviewees to identify possible reasons for this phenomenon (Table 4).

Interviewee	Statement
PT2	"The bottom line is lack of time, lack of people and pressure to publish. Volume, newspapers live on volume. For example, [name of media outlet] faces substantial pressure from platforms to increase article output. Why is that? Because without publication, you don't have volume"
PT3	"I think this is mostly linked to time constraints. The lack of time. Editors who actually work as editors or an editor-in-chief who actually is an editor-in-chief. Also, a touch of idleness on the part of journalists"
PT4	"I don't really conceive of there being less verification"
ES4	"Because of the tyranny of clicks. It's a mistake. People are becoming infected. It starts with a boss who puts more pressure on people, and they assume they have to run due to the prevalence of immediacy"
ES5	"About the race we frequently engage in with competitors to be the first. It's often more about personal career than the reader"
ES6	"We lack time. And the problem stems from that politician, that government who sends out content to see if you click on it, and you don't cross-reference it. On top of that, we must be the first to publish"

Table 4. *Reasons journalists give for reducing verification efforts*

Among Portuguese journalists, time emerges as the primary critical factor. We also highlight one answer, which identifies two problems: (a) journalist *versus* content producer, and (b) the new generations of journalists.

> I think people perceive journalism as content creators. There's pressure to incorporate specific keywords in the headlines. I think many view themselves primarily as content creators. I have this discussion a lot here in the newsroom. Sometimes, it's more about quantity than quality because the way journalism is thought of now, among this generation working with me, which is mostly young, is with this idea. It's all much more ephemeral, it's all much more "we have to publish now", "we have to do it nicely, we don't have to make nice good". (PT6)

Some also point to the big platforms and the need to generate volume, in other words, to publish a lot of news (Morais & Jerónimo, 2023).

On the other hand, Spanish journalists do not seem to have different views on immediacy and time pressure. There is apparent consensus that the local media have also entered the race to publish first and fast to get more clicks and generate more website traffic (Jenkins & Jerónimo, 2021; Jerónimo, 2015). This competition causes tensions within newsrooms, hastens news preparation, and means that some of it is not verified as it should be. There is also the notion that incorrect information published online can be swiftly corrected or that news pieces can be enhanced or supplemented promptly. This dynamic fosters a certain sense of tentativeness in what gets published.

A trust-based relationship between journalists and their sources is essential for exercising their profession. This trust may or may not be decisive in the verification process. Thus, we wanted to investigate whether journalists verify information from official sources (Table 5). In Portugal, as a general rule, journalists typically refrain from doing so. The main reason for this is the trust placed in official sources. However, it is also acknowledged that this is built up over time and that if there is a breach of trust or, on the other hand, the subject matter is sensitive, there will be verification or more verification than usual. In Spain, official sources also enjoy absolute credibility as their information is not verified. The practice of journalists being mere recipients of official releases or notices or publishing politicians' statements without context or counterpoint (Jerónimo, 2015) has turned some media outlets into vehicles for promoting biases, inaccuracies, or mistakes.

Interviewee	Statement
PT1	"Of course! (...) You see, there has to be some trust on the part of journalists, but that doesn't mean verification should be disregarded"
PT5	"If it is a credible source, one that you do believe and whose track record has always been credible, there's no need to double-check from the outset. If it fails the first time, then you must start that process or give up that source"
PT6	"I cannot claim they are all absolutely reliable, but as we need sound for the radio, we consistently seek verbal confirmation of the information. For us, that's a guarantee that the information is real"
ES2	"Very rarely. Only when we are talking about crucial issues, the budgets of a city or community. On a day-to-day basis, we are very comfortable believing what comes from an official source. We tend to take it for granted, perhaps because we understand that the filter applied by the communications director working for these administrations involves a journalistic and ethical assessment similar to ours"
ES4	"No. It's a problem with journalism in general. We're doing press release journalism and WhatsApp journalism. Today, there are no teleprinters or faxes, but there are emails, and it's more comfortable to pick them up and reproduce them"
ES6	"It's not verified because the official source is reliable. But during the pandemic, official sources gave different death tolls. Who do we believe? One of the problems we have is that if we try to check with official sources, they do not acknowledge their shortcomings. They do not help us contrast or verify the news. We ask for information using transparency legislation, and they take a long time to provide it. When we say we are journalists, it's even more complicated"

Table 5. *Fact-checking information from official sources*

Interacting with sources and validating the information they provide is part of journalists' daily routines. Nevertheless, there are different types of sources, and the relationship may differ. Having explored how local media professionals in the examined countries manage data from official sources, we sought to gain insight into their approach toward content originating from (a) other media outlets and journalists and (b) users on social networks.

The track record of the media and news authors explains why some of the interviewees in Portugal do not view all sources equally. Some are considered more trustworthy than others. On the other hand, when it comes to news disseminated by other media outlets and/or journalists that might lead to fresh stories or new angles, there will always be verification.

> If a media outlet is reliable, it is indeed reliable! But we also have to consider the scale of what is being reported and even the impact it will have. While, on the one hand, in certain situations, it's enough to quote the media outlet and include a few excerpts, building the news ourselves, on the other hand, if we see that it's something very impactful, for example, on the public, we can and we should. (PT1)

In Spain, the interviewees mostly reverify, cross-referencing news from other media outlets and/or journalists. They also emphasize that their confidence in externally published information hinges on their understanding of those sources' professionalism or lack thereof. "We are much more critical of fellow journalists than institutions and administrations due to the drive to excel and do things differently" (ES2). Depending on the credibility and standing of the editor, Spanish local media outlets appear to choose between directly citing or independently sourcing information.

Using content published on social media by users or sharing it on the media outlet's own profiles or pages is something that has already been studied in local media (Amaral et al., 2020; García-de-Torres et al., 2011; Said-Hung et al., 2014). In the current study, focusing on the Portuguese sample, viewpoints are split. While some participants disregard social networks entirely, others do not ignore their content. Furthermore, distinctions in practices between professional and personal usage are evident. In the professional sphere, what other users share on social networks can occasionally serve as a basis for journalistic work within the newsrooms of media outlets where the interviewees are employed. In contrast, in their capacity, the position of journalists is more extreme, as they decide whether or not to publish content created by others.Trust in the source's credibility plays a pivotal role in these dynamics.

> Certain facts unfolding on social media and reported there lead to an "investigation". Now, transcribing or posting a story you see on a profile of someone you simply don't know does not happen. Even when we know the person, we pick up the phone or email them so that they can tell us, and not on social network. (PT5)

As for the Spanish sample, the notion of learning from mistakes resurfaced. While in the first phase of using social networks, they were perceived as a rapid means to access sources and street-level events or to gauge public sentiment (García-de-Torres et al., 2011), journalists now realise that these networks can propagate virtually anything, particularly content designed to manipulate or disseminate disinformation/misinformation. Several acknowledge the journalist's role as a gatekeeper, responsible for sieving through information, in contrast to social media user profiles. "Do we let someone who isn't a nurse or doctor vaccinate us? The same applies to journalism. Today, everyone is chasing clicks and followers" (ES6). Some highlight, using examples, the potential consequences for the local media's credibility in the population's eyes when they opt to include user-generated content without proper verification.

An incident involving an atypical heavy snowfall in a Spanish port town comes to mind. An image was shared through WhatsApp, and while certain media outlets took the time to verify that it was an old photograph, others promptly published it as breaking news. "That really prompted us to take note and be cautious from that moment on about what came through social media" (ES5). The same happened during the pandemic, with images of wild animals supposedly invading some areas of the city which were fake.

The subpar quality of the information that is sometimes published in the regional press, which has been analysed in previous studies (Rivas-de-Roca, 2022), is directly related to the subordination and lack of detachment of certain sources. This problem becomes even more pronounced when it comes to institutional sources. The journalists interviewed do not subject these sources to thorough scrutiny; instead, they rely on the communication strategies outlined by the local and regional authorities' press offices. The precariousness of the local media and the excessive dependence on official information lead journalists to overlook or inadequately verify information from these organisations. This can result in the dissemination of inaccurate or uninformative content.

Recent research on the performance of local media in Spain and Portugal indicates that journalists recognise the need to refrain from overusing these official sources and engaging in so-called "declarative journalism". Instead, they prioritise generating original content as a distinguishing factor that shapes the quality of their work and the service they provide to their audience (Alcaide-Pulido, 2023; Rivas-de-Roca, 2022).

Hence, incorporating verification practices, including official information, should be part of the daily routine for local media journalists, especially considering the high susceptibility to disinformation/misinformation within urban contexts (Alcaide-Pulido, 2023). Nonetheless, many journalists perceive verification as an enduring element of quality journalism (Couraceiro et al., 2022).

4. Conclusion

This study underscores certain factors that impact the operational dynamics of journalists working in local media across Portugal and Spain, ultimately impeding their ability to fact-check the information they receive effectively. Firstly, two external factors impede journalists from effectively conducting verifications: time limitations and a shortage of personnel to perform the task optimally.

Verification is part of their daily work routine for most journalists interviewed, whether in Spain or Portugal. In order to engage in thorough journalism, it is essential to validate the accuracy of all incoming information from various sources, whether official or from community groups and associations. Nevertheless, the time constraint and the urgency brought on by digital editions and click-based priorities, coupled with the aspiration to be the first to publish and garner feedback on social networks, accelerate the publishing process and hinder comprehensive information verification. Time becomes even more scarce when there are not enough people to manage the considerable volume of information that requires publication. The downsizing of these media organisations over the past 15 years has prevented cuts during the pandemic. With the same level of resources in newsrooms but increased public demand for information, crucial steps are overlooked, leading to reduced verification efforts and a decrease in the number of sources used. Effective fact-checking cannot be accomplished without adequate time and personnel.

In addition to external factors, there are internal or subjective factors related to journalists' own attitudes, which affect how they verify information. Thus, excessive reliance on official sources, sometimes combined with sloth — as Portuguese journalists admit — means that the local media in Portugal and Spain do not check information with official sources. This dynamic suggests that the journalist conveys a single version of the facts as if they were the truth, confident that the institutions are telling them the facts or the gist. The reality is that the media and journalists have made countless mistakes by following the discourse of official sources almost mindlessly. There are also the interests of parties holding government positions or incriminating police reports in which the version of the detainee or accused never surfaces.

Despite the above, the interviews demonstrate, especially in the case of Spain, a willingness on the part of journalists to learn from past mistakes and adapt to the current situation of limited time and resources. To this end, some choose to give up the race for immediacy and invest in slower journalism, which focuses on specific themes and is rigorously prepared. The media outlets featuring this type of journalism thus have a chance of standing out from those that go for the "tyranny of clicks".

Based on the information, it is possible to conclude that the journalists interviewed strive for an improvement in the quality of their information, as they are aware of their excessive dependence on institutional sources, the existence of prejudices and political interests among the local ruling class and their limited ability to correctly verify disinformation/misinformation content, due to the scarcity of models, the lack of training in technological tools and the immediacy imposed by digital content. Journalists are aware of the problem and how the decline in the quality of information undermines public confidence, and they are the first to take an interest in tackling these problems, learning from their experiences and implementing new approaches in their newsrooms.

Finally, we acknowledge the limitations of this study, which, as stated, is exploratory. The number of interviews may be considered small and based on two countries. However, they allow for the collection of indicators on a little-studied area: disinformation/misinformation on a local scale (Jerónimo & Esparza, 2022) and, above all, fact-checking practices and challenges for journalists working in the local media. Thus, quantitative studies, such as surveys of journalists and media in other countries, could be promoted. The same goes for the prospect of collaboration by the public in the verification process (Allen et al., 2021), but studying this possibility with and around local media.

Translation: Anabela Delgado

Acknowledgements

This article is part of an ongoing project (PTDC/COM-JOR/3866/2020) funded by the Fundação para a Ciência e a Tecnologia, Portugal.

References

Abernathy, P. M. (2018). *The expanding news desert*. Center for Innovation and Sustainability in Local Media.

Abernathy, P. M. (2020). *News deserts and ghost newspaper: Will local news survive?* Center for Innovation and Sustainability in Local Media. https://www.usnewsdeserts.com/reports/news-deserts-and-ghost-newspapers-will-local-news-survive/

Alcaide-Pulido, P. (2023). La lucha contra la desinformación en los contextos locales. *Revista Multidisciplinar*, *5*(2), 157–175. https://doi.org/10.23882/rmd.23145

Allen, J., Arechar, A. A., Pennycook, G., & Rand, D. G. (2021). Scaling up fact-checking using the wisdom of crowds. *Science Advances*, *7*(36), Article eabf4393. https://doi.org/10.1126/sciadv.abf4393

Amaral, I., Simões, R. B., Jerónimo, P., & Fidalgo, M. (2020). Facebook y periodismo de proximidad: Estudio de caso de los incendios en Portugal de 2017. In A. M. V. Dominguez (Ed.), *Aproximación periodística y educomunicativa al fenómeno de las redes sociales* (pp. 181–193). McGraw-Hill.

Ardia, D., Ringel, E., Ekstrand, V. S., & Fox, A. (2020). *Addressing the decline of local news, rise of platforms, and spread of mis-and disinformation online*. University of North Carolina at Chapel Hill.

Asociación para la Investigación de Medios de Comunicación. (2018). *Marco general de los medios en España 2018*. https://www.aimc.es/otros-estudios-trabajos/marco-general/descarga-marco-general/

Bell, E., Owen, T., Brown, P., Hauka, C., & Rashidian N. (2017). *La prensa de las plataformas. Cómo Silicon Valley reestructuró el periodismo*. Columbia University. https://doi.org/10.7916/D8B86MN4

Camponez, C. (2002). *Jornalismo de proximidade – Rituais de comunicação na imprensa regional*. Minerva.

Couraceiro, P., Paisana, M., Vasconcelos, A., Baldi, V., Cardoso, G., Crespo, M., Foá, C., Margato, D., Cano-Orón, L., Cabrera García-Ochoa, Y., Crespo, A., López-García, G., Llorca-Abad, G., Moreno-Castro, C., Rubio-Candel, S., Serra-Perales, A., Valera-Ordaz, L., Vengut-Climent, E., Von Polheim-Franco, P., ... Hernández Escayola, P. (2022). *The impact of disinformation on the media industry in Spain and Portugal*. IBERIFIER. https://doi.org/10.15581/026.001

Edmonds, R. (2022, June 29). *An updated survey of US newspapers finds 360 more have closed since 2019*. Poynter. https://www.poynter.org/business-work/2022/an-updated-survey-of-us-newspapers-finds-360-more-have-closed-since-2019/

Fernandes, J. C., Del Vecchio-Lima, M. R., Nunes, A. F., & Sabatke, T. S. (2021, August 28). *Jornalismo para investigar a desinformação em instância local* [Conference presentation]. VIII Seminário de Pesquisa em Jornalismo Investigativo, Online.

Galletero-Campos, B. (2018). *Del periódico impreso al diario digital: Estudio de una transición en Castilla-La Mancha* [Doctoral dissertation, Universidad de Castilla-La Mancha].

Galletero-Campos, B., & Jerónimo, P. (2018). La transición digital de la prensa de proximidad: Estudio comparado de los diarios de España y Portugal. *Estudos em Comunicação*, *1*(28), 55–79. https://doi.org/10.25768/fal.ec.n28.a03

García-de-Torres, E., Yezers'Ka, L., Rost., A., Calderín, M., Edo, C., Rojano, M., Said-Hung, E., Jerónimo, P., Arcila-Calderón, C., Serrano-Tellería, A., Sánchez-Badillo, J., & Corredoira, L. (2011). Uso de Twitter y Facebook por los medios iberoamericanos. *EPI – Revista internacional de Información, Documentación, Biblioteconomía y Comunicación*, *20*(6), 611–620. https://doi.org/10.3145/epi.2011.nov.02

Graves, L. (2016). *Deciding what's true: The rise of political fact-checking in American journalism*. Columbia University Press.

Graves, L. (2018). *Understanding the promise and limits of automated fact-checking* [Fact sheet]. Reuters Institute; University of Oxford. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2018-02/graves_factsheet_180226%20FINAL.pdf

Izquierdo Labella, L. (2010). *Manual de periodismo local*. Editorial Fragua.

Jenkins, J., & Jerónimo, P. (2021). Changing the beat? Local online newsmaking in Finland, France, Germany, Portugal, and the U.K. *Journalism Practice*, *15*(9), 1222–1239. https://doi.org/10.1080/17512786.2021.1913626

Jerónimo, P. (2015). *Ciberjornalismo de proximidade: Redações, jornalistas e notícias online*. LabCom.IFP.

Jerónimo, P., & Esparza, M. S. (2022). Disinformation at a local level: An emerging discussion. *Publications*, *10*(2), 1–14. https://doi.org/10.3390/publications10020015

Jerónimo, P., Ramos, G., & Torre, L. (2022). *News deserts Europe 2022: Portugal report*. LabCom; MediaTrust.Lab. https://doi.org/10.25768/654-875-9

Lusa. (2022, June 4). Portugal tem 61 concelhos sem jornais e rádios com sede: "Deserto de notícias vai agravar-se". *Jornal de Negócios*. https://www.jornaldenegocios.pt/empresas/media/detalhe/portugal-tem-61-concelhos-sem-jornais-e-radios-com-sede-deserto-de-noticias-vai-agravar-se

Lyons, T. (2018, May 23). *Hard questions: What's Facebook's strategy for stopping false news?* Meta. https://about.fb.com/news/2018/05/hard-questions-false-news/

Meta. (n.d.). *Programa Acelerador do* Meta Journalism Project. Retrieved June 29, 2022 from https://www.facebook.com/formedia/mjp/programs/global-accelerator

Morais, R., & Jerónimo, P. (2023). "Platformization of News", authorship, and unverified content: Perceptions around local media. *Social Sciences*, *12*(4), Article 200. https://doi.org/10.3390/socsci12040200

Newman, N., Fletcher, R., Robertson, C. T., Eddy, K., & Nielsen, R. (2022). *Reuters institute digital news report 2022* (Vol. 2022). Reuters Institute for the Study of Journalism. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2022-06/Digital_News-Report_2022.pdf

Newman, N., Fletcher, R., Shulz, A., Andi, S., Roberston, C., & Nielsen, R. (2021). *Reuters institute digital news report 2021* (Vol. 2021). Reuters Institute for the Study of Journalism. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2021-06/Digital_News_Report_2021_FINAL.pdf

Nielsen, R. (2015, June 17). *More and more media, less and less local journalism*. European Journalism Observatory. https://en.ejo.ch/digital-news/more-and-more-media-lessand-less-local-journalism

Park, J. (2021). *Local media survival guide 2022: How journalism is innovating to find sustainable ways to serve local communities around the world and fight against misinformation*. International Press Institute. https://ipi.media/local-journalism-report-survival-strategies

Radcliffe, D. (2018, November 27). *How local journalism can upend the 'fake news' narrative*. The Conversation. https://theconversation.com/how-local-journalism-can-upend-the-fake-news-narrative-104630

Ramos, G. (2021). Deserto de notícias: Panorama da crise do jornalismo regional em Portugal. *Estudos de Jornalismo*, (13), 30-51.

Rivas-de-Roca, R. (2022). Calidad y modelos de negocio en los medios de proximidad. Estudio de casos en Alemania, España y Portugal. *Estudos em Comunicação*, *34*, 81–96. https://hdl.handle.net/11441/133912

Said-Hung, E., Merino-Arribas, M., & Martínez-Torres, J. (2021). Evolución del debate académico en la Web of Science y Scopus sobre unfaking news (2014-2019). *Estudios Sobre El Mensaje Periodístico*, *27*(3), 961–971. https://doi.org/10.5209/esmp.71031

Said-Hung, E., Serrano-Tellería, A., García-De-Torres, E., Calderín, M., Rost, A., Arcila-Calderón, C., Yezers'ka, L., Bólos, C. E., Rojano, M., Jerónimo, P., & Sánchez-Badillo, J. (2014). Ibero-American online news managers' goals and handicaps in managing social media. *Television & New Media*, *15*(6), 577–589. https://doi.org/10.1177/1527476412474352

Satariano, A., & Isaac, M. (2021, September 3). El socio silencioso que hace la limpieza de Facebook por 500 millones al año. *The New York Times*. https://www.nytimes.com/es/2021/09/03/espanol/facebook-moderacion-accenture.html

Sharma, P. (2021). *Coronavirus news, markets and AI: The COVID-19 diaries*. Routledge.

Torre, L., & Jerónimo, P. (2023). Esfera pública e desinformação em contexto local. *Texto Livre*, *16*, 1–14. https://doi.org/10.1590/1983-3652.2023.41881

Wiltshire, V. (2019). *Keeping it local: Can collaborations help save local public interest journalism?* Reuters Institute for the Study of Journalism.

Biographical Notes

Pedro Jerónimo is an assistant researcher at LabCom, a research unit of the University of Beira Interior, where he is responsible for *MediaTrust.Lab - Local Media Lab for Civic Trust and Literacy*, a project funded by the Fundação para a Ciência e a Tecnologia. He is also a member of *CROSSMEDIA-EU - Las Alianzas Mediáticas Como Motor de Supervivencia del Periodismo Frente a la Desintermediación y la Desinformación. Los Consorcios y Proyectos Periodísticos Colaborativos*, a project funded by the Spanish Government and the European Commission. He also collaborates with the Communication and Society Research Centre (Portugal) and the Observatorio de Medios Digitales (Spain). He is the founder and coordinator of the Regional and Community Media Working Group of the Portuguese Association of Communication Sciences. He has participated in other projects, was editor of scientific journals and is on the editorial committee of some of them, including *Digital Journalism*. He has a PhD in information and communication on digital platforms (University of Porto and University of Aveiro, Portugal) and began his career as a journalist in the Portuguese regional press.

ORCID: https://orcid.org/0000-0003-1900-5031

Email: pj@ubi.pt

Address: Universidade da Beira Interior, Rua Marquês D'Ávila e Bolama, 6201-001 Covilhã

Marta Sánchez Esparza is a professor at the Universidad Rey Juan Carlos and the Universidad Internacional de la Empresa, both in Madrid, Spain and a journalist. She has a PhD in information sciences (University of Malaga), a postgraduate qualification in strategic communication and advocacy (National University of Distance Education) and a master's degree in digital transformation and business development (University of Barcelona). Her areas of interest are journalism, technology and the narrative processes in shaping public opinion, public discourse in the new digital ecosystem and disinformation. She is a member of the board of the Association of Investigative Journalists and the Madrid Journalists' Union. She is a member of the European Federation of Journalists Digital Experts Group.

ORCID: http://orcid.org/0000-0001-6525-0148

Email: marta.sanchez@urjc.es

Address: Universidad Rey Juan Carlos, Camino del Molino s/n, 28943 Fuenlabrada, Madrid

Submitted: 03/02/2023 | Accepted: 11/07/ 2023

Comunicação e Sociedade, vol. 44, 2023, e023019
https://doi.org/10.17231/comsoc.44(2023).4622

A New Form of Precarity (of Practice)? Professional Deskilling at the Centre of the Hijacking of Quality in Journalism

Tiago Lima Quintanilha
ICNOVA, Faculdade de Ciências Sociais e Humanas, Universidade NOVA de Lisboa, Lisbon, Portugal

Abstract

This article seeks to fill in one of the main identifiable gaps in the debate on professional deskilling in journalism. This gap consists of the difficulty in isolating this concept from other multiple meanings that is critical when interpreting the challenges imposed on journalism, which are multiple and range from the erosion of professional domination to crises of values, including the instability of business models with a marked impact on the reconfiguration of the division of journalistic labour.

To that end, the literature on professional deskilling was used as a resource and systematically analysed to produce a structured and maximalist definition of this concept in journalism. A definition that essentially results from the arrangement of multiple meanings within two main aspects: the destandardisation of journalistic work and the immediacy of journalistic production. It is concluded that a deskilling of the journalist profession constitutes a new type of precarity of practice, able to capture journalistic quality and which goes beyond the traditional and well-documented precarity of employment and labour.

Finally, we suggest future avenues to continue monitoring the pace of professional transformation and how it will continue to affect journalistic skills and the quality of professional practice, in particular the phenomenon of digital automation in journalism, which has the capacity to dictate a return to the debate on professional deskilling in journalism.

Keywords
journalism, profession, deskilling, quality of journalism

Uma Nova Forma de Precariedade (da Prática)? A Descompetencialização Profissional no Centro do Sequestro da Qualidade no Jornalismo

Resumo

Este artigo procura responder a uma das principais lacunas identificáveis no debate sobre descompetencialização profissional no jornalismo. Esta lacuna consiste numa dificuldade em isolar da restante polissemia conceptual este conceito que é crítico na interpretação dos desafios impostos ao jornalismo, que são múltiplos e que vão da erosão da dominação profissional às crises de valores, passando pela instabilidade de modelos de negócio com impacto acentuado na reconfiguração da divisão do trabalho jornalístico.

Para tal, e com recurso a uma sistematização da literatura sobre descompetencialização profissional, chegamos a uma definição estruturada e maximalista deste conceito no jornalismo. Definição que resulta fundamentalmente da arrumação dos múltiplos significados em dois indutores principais: a despadronização do trabalho jornalístico e o imediatismo na produção jornalística. Uma descompetencialização na profissão de jornalista que, conclui-se, constitui um novo tipo de precariedade da prática, capaz de capturar a qualidade jornalística e que vai além das tradicionais e muito documentadas precariedades do emprego e do trabalho.

Por fim, ensaiamos pistas futuras para continuar a acompanhar os ritmos de transformação profissional e a forma como estes continuarão a abalar competências jornalísticas e a qualidade da prática profissional, nomeadamente o fenómeno da automação digital no jornalismo com capacidade para ditar o regresso ao debate sobre descompetencialização profissional no jornalismo.

Palavras-chave
jornalismo, profissão, descompetencialização, qualidade do jornalismo

1. Introduction

The new evolutionary process in the relations between media and society has inaugurated an arena of permanent disruption in post-industrial journalism (Deuze, 2017; Hirschhorn, 1988; Jenkins, 2006; Sonwalker, 2019). This disruption is fuelled by the acceleration of information flows and the hyperabundance of content, which have led to the liquidation of the classic media economy by reducing the economic value of news (Tandoc et al., 2019).

This process, aided by another disintermediation phenomenon in journalism caused by the strengthening (Manovich, 2020) of subjournalisms in networked architectures (Beckett, 2008; Benkler, 2006; Benson, 2019; Hjarvard, 2012; Steensen, 2016), has led journalism and journalists to permanently renegotiate their contract with society (Karlsen & Stavelin, 2014; Singer, 2010; Zelizer, 2015). This is happening at the same time as robust competitive disputes are taking place within a context of divestment by advertisers who are migrating to the major digital players, which have a greater capacity to lock in audiences, as a result of what Hindman (2018) would define as a "greater degree of online viscosity".

This results in impoverished legacy media, struggling to raise revenue, and working to rationalise resources while desperately trying to produce informative content which has a market value (Carlson, 2014; Compton, 2010).

At this juncture, a techno-market supra-ideology of journalism is being established even more than in the past (den Bulck, 2018), which is entering into conflict with the values, objectives and positive function of the profession (Bruns, 2005; Deuze, 2005; Fenton, 2010; Hjarvard, 2012; Singer, 2010). At the same time, its professionals are immersed in a triadic system of doing more, quicker and with fewer resources, in a drift towards a kind of new professional Taylorism.

As a consequence, we are witnessing a consolidation of deskilling tendencies within journalism, with an impact on journalistic *doing* (practice) but also on journalistic *knowledge* (epistemology; Rottwilm, 2014). Deskilling tendencies that position themselves as antagonists to the journalist's occupational ideology (Hermida, 2019).

This literature review seeks to recover this debate and deepen knowledge about a concept that is absolutely critical in understanding the challenges faced by journalism, journalists and the quality of their practice. This involves the concept of deskilling, so dear to some of the most celebrated authors in journalism studies (Chambers & Steiner, 2010; Cottle, 2000; Deuze, 2001, 2005, 2007, 2009; Deuze & Yeshua, 2001; Fenton, 2010; Örnebring, 2019; Rottwilm, 2014; Singer, 2004). A concept that is built up in layers, that is, according to the arrangement of other micro and meso concepts that broadly delimit much of the existing literature on the challenges imposed on journalism.

In addition, it is hoped that this article responds to possibly existing gaps in the knowledge already produced on this subject, particularly the link that can be established between understanding these deskilling phenomena in journalistic practice and the sociologies of work, employment and professions. These disciplinary fields focus on issues of decent work, remuneration for the work performed and identifying forms of precarity in the area of the casualisation of work, which are boosted by the global economy and informationalism as the material foundations of 21st century societies.

2. The Origin of the Concept

The inclusion of the concept of deskilling within journalism studies is difficult to pinpoint in time. However, this concept has been present in other scientific fields in a more established manner, such as the sociologies of work, employment and professions, in accompanying a more ideological debate on the transformations brought about by economic globalisation in its relationship with the employment market, particularly the exploitative aspect of labour in capitalist systems (Abel, 2001; Baba, 2015; Bowker & Star, 2015; Carroll & Mentis, 2008; Castells, 1996/2002; Downey, 2021; Ferris et al., 2010; Gamst, 2015; Kim et al., 2003; Man, 2004; Martinaitis et al., 2021; Saunders, 2001; Star, 2001; Wall & Parker, 2001).

One of these debates revolves around the figures of rationalisation and flexibility of resources, which in a certain way go hand in hand with Manuel Castells's rationale (1996/2002) in his work *A Sociedade em Rede* (The Network Society), when he talks about a set of opportunities that the process of globalisation and informationalism have brought to companies in capitalist countries. Opportunities in terms of reducing the permanent workforce to a strictly necessary number, contractual flexibility and, broadly speaking, the major changes the labour market has undergone towards its deregulation. Opportunities that point, above all, to objectives such as reducing contractual rigidity, easing labour market constraints by giving new meaning to workers' rights, and giving companies the ability to reorganise more effectively in scenarios of economic fluctuation through allowing greater freedom to hire and fire, which has been made possible by decreasing legislation within the labour market (Rodrigues, 2009).

The situation is no different in media and communication companies (Bastos, 2014; Cobos, 2017; Matos, 2017; von Rimscha, 2016). In general and across all sectors, what is at stake is that the workforce, including the permanent staff, consents to more volatile work or pay circumstances as an *a priori* condition for continuity in employment, or as a prologue to achieving some kind of permanent worker status that is continually postponed by the organisational leadership, for example the case of recently graduated journalists, who are moving between different internships (Asahina, 2019; Örnebring, 2018).

For Castells (1996/2002), one of the consequences of these processes of weakening fundamental principles and rights that coexist in the transition to the information economy is precisely the internalisation of a permanent idea of maximising productivity and efficiency in all production processes. This is the case even when terms such as "rationalisation of resources" and "flexibility of contractual relations" seem to paradoxically work against the possibility of improving working conditions which are at the root of the information paradigm itself. An ideology that, by extension, implies that workers must apply their full productive capacity under any and all circumstances, to the detriment of the perfection and expertise associated with undertaking the trade. What Bourdieu (2001), would ideologically call the "methodical atomisation" of work. An atomisation resulting from the wider processes of the desocialisation of paid employment, which succumbs to skilful liberalism and the inflexible demands of the "leonine employment contract dressed in the robes of flexibility" (Bourdieu, 2001, p. 7). Not least because, as Chen and Sonn (2019) describe, the flexible organisation on which employment contracts are often based is the ideal environment for conditions that are conducive to professional deskilling.

It is within this perspective of abandoning the time-consuming expertise of established professions in favour of consolidating flexible management (generally associated with downsizing), and which responds to the interconnected impact of economic globalisation and the spread of information technologies, that the concept of professional deskilling seems to find its strength.

In fact, Gamst (2015) states that professional deskilling occurs when there is a continuous loss of competences which, for Ferris et al. (2010), can also affect the cognitive dimension. A loss of skills that leads precisely to a proletariat dispossessed of expertise, reflecting the constraints, especially external ones (Chen & Sonn, 2019), imposed by capitalism and the deregulation of labour markets (Martinaitis et al., 2021; Wood et al., 2019).

Braverman (1974) had already pointed out that professional deskilling, which is a new historical phase of capitalism, results in a complete inversion of the quality of trade work, and is therefore a mechanism for the degradation or dequalification at work. Degradation of labour which, in the view of Cole and Cooper (2006), is associated with the same processes of the intensification of the productivity of labour.

In fact, in an article published by Liu (2006), the concepts of "deskilling of labour" and "degradation of labour" are presented as expressions with exactly the same meaning.

In turn, Gamst (2015) brought the meaning of professional deskilling, from a neo-Marxist teleological perspective, closer to the forms of the social control of workers achieved through the meticulous division of labour. Forms that project the organisation of that very same work into essentially simple and repetitive tasks, capable of calling into question the occupational ideology of professions, even those often marked by a monopoly of knowledge (journalism is one such profession).

For Wall and Parker (2001), Kim et al. (2003) and Downey (2021), the phenomenon of professional deskilling means, above all, that there is a process of labour simplification or a simplification of tasks (either in terms of autonomy in undertaking the task or in terms of the identity and significance of that same task). A process that contributes to a continuous trend towards the standardisation of work within dynamics that tend to become more acute over time (Kim et al., 2003) and that have found a major stimulus in the last great technological revolution and in its component information technology (Downey, 2021; McQuail, 2007).

For Abel (2001) and Carroll and Mentis (2008), such a fate began its course with 18th and 19th century relations of production and which, for Chen and Sonn (2019), is essentially the effect of a contingent proletarianisation of the labour market and the professions that comprise it. A premise that goes so far as to contradict the paradigms of linear transformation and transition from a manual economy to an economy based on creative labour (Chen & Sonn, 2019). This is something which, according to the authors, many academics failed to foresee and has helped to sustain the decades-long debate, with implications for society, that creative work was essentially immune to the principle of professional deskilling. Nowadays this is an extremely useful element in understanding the proletarianisation of that creative work.

Still in the field of the correspondence between professional deskilling and the consolidation of capitalist models, Cole and Cooper (2006), in studying this phenomenon systematically and over time in the Japanese railway sector, concluded that the privatisation processes of different industries also end up leading to the resurgence of pockets of professional deskilling. The authors thus position this phenomenon as a consequence of the denationalisation processes offered by economic liberalism.

In addition, a study carried out in Canada at the beginning of the millennium (Man, 2004), which involved Chinese immigrants in that country, concluded that the work of immigrant women is also more susceptible to the problem of professional deskilling, introducing this issue into the field of social, ethnic, gender, class and citizenship inequalities.

The problem of professional deskilling which, despite everything, is not static and which, in certain situations, generates a reverse reaction towards professional reskilling. Something that Agnew et al. (1997) found to occur in very specific sectors. This is the case in the computer and information technology sectors, which are more susceptible to ongoing updates in professional techniques, as is also the case in certain follow-up phases in the automotive industry (Forslin, 1990).

In addition, as Chen and Sonn (2019) point out, the debate on professional deskilling only later on assimilated the idea that often, and in many professional activities, the aggravation of this professional deskilling is paradoxically accompanied by an increase in the qualification levels of workers, not least because of the increase in the education levels of the working population. This belated debate is perhaps due to a certain tradition of Marxist thought that also attributes more complex tasks to the highest skill levels (Ertürk, 2019). A principle that Braverman (1974) rejected early on, pointing out, for example, that the phenomenon of professional deskilling was not limited to blue-collar or low-skilled workers, but also affected white-collar or so-called "highly skilled" workers.

This implies that there is sometimes a clear mismatch between qualifications as a principle for controlling entry into professions (which is constantly increasing with the rise and diversification of tertiary education levels), and the complexity of the task that is carried out under this qualification label. Or, if we wish, a disconnect between the level of qualification required to enter a particular profession, such as journalism, as will be seen below, and the reduction, or a kind of withering away, of the skills and expertise historically necessary to carry out that practice. This is despite the fact that Chen and Sonn (2019) emphasise the need to consider the necessary interprofessional fluctuations within this approach, not least because of the phenomena of professional reskilling that occur in very specific professions that are not so susceptible to the phenomena of progressive deskilling (Agnew et al., 1997; Forslin, 1990).

3. The Concept in Journalism Studies and Communication Sciences

The application of the concept of deskilling in journalism studies forms part of a holistic approach that has a history in this disciplinary field and which concerns the multiple challenges posed to this activity, which has been so greatly impacted by the effects of post-industrialism and information technology, in renegotiating its contract with society. It is this holistic approach that determines that the concept is heavily immersed in discourses where a certain conceptual polysemy predominates.

However, since the use of the concept can be mainly traced back to key authors within the theoretical tradition of journalism studies, it is now possible to establish a rationale for the entry of this concept as a central element in the debate on seizing the quality of professional practice and on the obsolescence of the profession's occupational ideology.

At the beginning of the millennium, Simon Cottle (2000) signalled that journalistic practice had become susceptible to processes of professional dequalification as a result of forced procedures to diversify professional skills, which ended up having a perverse effect on the quality of practice. The author thus associated the issue of deskilling with pressure to intensify multiple professional skills in newsrooms.

However, this discussion was initially positioned in an ambivalent manner. At a time when these issues were coming to the fore in the debate on the major transformations brought about by information technology in the profession, authors such as Jane Singer (2004) tried to find out from professional journalists whether this pressure to increase skills and to abandon departmentalisation within journalistic work implied a loss of know-how and quality of practice. Or, on the other hand, if it meant a strengthening of competences. A discussion that, over time, has strengthened the weight of the former hypothesis and reduced that of the latter, mostly because of the amplification of issues related to the processes of simplifying the news story, with repercussions on its quality.

In fact, some 15 years after the first ideas put forward by Cottle (2000), Rottwilm's (2014) discourse was once again tuned to that same note, suggesting that journalistic activity, by demanding more and more versatility and multitasking, ended up fuelling mechanisms that incapacitated professional performance and different tasks in their entirety. A situation that would lead to the idea of deskilling that Fenton (2010), a few years earlier, had also characterised as one of the serious causes of a wider mechanism for deregulating levels of professionalism in journalism.

This association of the term "deskilling", as a concept, with multiskilling and multitasking has thus become more prevalent. This predominance can be identified, for example, in one of the most important works in journalism studies in recent years, *The Routledge Companion to News and Journalism*, organised by Stuart Allan (2010). In one of the glossary entries, the concept of "deskilling" ends up referring precisely to the meanings and consequences of two other attributes that are heavily revisited in this field of study, that is, multiformats and multitasking.

On the other hand, another of the leading authors in this scientific field, Mark Deuze (2001, 2005, 2009), has over the years positioned the debate on deskilling in journalism within an essentially critical perspective of the revisited myth of the internet as a technological panacea. The author fully understands this challenge of deskilling imposed on the journalistic profession as a consequence of the transition to post-industrial online journalism (Deuze, 2005). A transition powerful enough to shape a dramatic conceptual change in journalistic practice (Deuze, 2009), which was effected by a sharp decline in the structures overseeing the flow of information and which has had to cumulatively deal with new ethical dilemmas that affect its credibility (Deuze & Yeshua, 2001). This changing nature of journalistic work ends up having an impact on the autonomy of journalists by affecting the roles they play, and in turn this affects the historical relationship of this craft with the quality of work structures (Witschge & Nygren, 2009).

The very process of gathering and processing information in post-industrial journalism is in itself a major symptom of the deskilling to which this profession is subject, resulting in a reconversion of work which ranges from writing news to rehearsing simple projections in replicating formats of trivialised, mechanised and undifferentiated information content. Content that is often an exact copy of news published by other brands — again, the aspect associated with processes simplifying labour and tasks.

In addition, the equally well-known author Henrik Örnebring (2009, 2010, 2019) points out that the process of deskilling in journalism is gaining traction and supports the idea discussed earlier that this deskilling stems from an almost institutionalised relationship in new journalistic practices. This relationship concerns the dichotomy of doing things faster and on different platforms (again, the meanings of multitasking and multiskilling are very present, to which the aspect of immediacy is added), which are a consequence of the seizing of time-consuming journalism formats (based on expertise and standardised work) through the intensification of technocratic management and organisational control of media companies.

This seizing takes place in parallel with the consolidation of a practice that is progressively oriented towards mass production, productivism and continuous cycles of fast content of debatable quality, speed-ups and permanent deadlines, which are reflected in the era of the hypercommercialisation of news. News that itself becomes a commodity like any other, dragging journalistic work into spheres of discussion that distance it from the seminal practice associated with the craft. An idea that Örnebring (2010) emphasises as being the main reason why it is said that one of the clearest symptoms of deskilling in journalism is the notion sometimes conveyed that the dissemination of the most basic news in continuous production chains does not require specific or very in-depth training in journalism. Something that, incidentally, may even be of use to the managers and administrators of media groups themselves, for whom, in the tug of war of ideological struggles and recovering the almost prophetic words of Carr-Saunders (Carr-Saunders & Wilson, 1933), not even journalists have a monopoly on the technique that is indispensable to the exercise of this profession.

Örnebring (2019) goes further and mentions that one of the basic problems in this debate on journalistic competences or their deskilling is precisely a historical difficulty in defining what can be understood as journalistic competence. This is a discussion that to a certain extent goes hand in hand with another on the non-consolidated definitions of what journalism is and the permanent conflict between the normative substance of journalism and its justificatory procedure (Anderson, 2019).

4. Tidying Up the Concept or the Multiple Layers of Professional Deskilling in Journalism

The methodological proposal of this article is not limited to systematising the existing literature on deskilling within journalistic activity. In fact, the main aim of this work is to advance the knowledge that has already been produced, that is, to find any gaps that may exist.

In order to achieve this, the following points propose the tidying up of the concept, through indicating the major meso and micro layers behind the macro meaning of professional deskilling. Somewhat ambitiously, a proposal that locates the practice of those which, in the literature, are the major indicators and inducers of deskilling in journalistic practice.

Given this, this discussion on deskilling in the journalistic profession will produce a framework in which the meanings of the destandardisation of journalistic practice and immediacy are positioned as essential elements of a more structured and maximalist consolidation of the concept.

Within a more meso level of analysis, the meaning of the destandardisation of journalistic work (Cohen, 2012) implies, in practice, an accelerated process of deregulation of journalistic work and of the levels of quality of its practice and, consequently and inherently, a reduction in levels of professionalism.

In this destandardisation of work, the often-seen micro aspects of multiskilling and multi-formats, which have the perverse effect of seizing the performance of tasks and formats in their full and optimal extent, and which are also a consequence of continuous reconfigurations of the division of labour aimed at rationalising costs, time and resources, consolidate scenarios involving the abandoning of the departmentalisation of work. This translates into the seizure of standardised work, expertise, speciality and time-consuming work. The connection to this techno-mercantile and productivist journalism thus results in a more all-round professional, capable of responding to the accumulation of simplified tasks, as well as the multi-formats and multiskilling required by the vertiginous pace of news (with practically zero economic value). However, this also results in a type of journalism that is focused on lower levels of professionalism, since it is structured around a dequalified, simplified practice and marked by what Deuze (2009) has called a decline in the structure of the procedure with an impact on its credibility.

Still on the meso level, the role of immediacy (Beckett, 2010; Fenton, 2010; Hass, 2011; Hjarvard, 2012; Karlsson, 2011; Waisbord, 2013) as an extension of the witnessed acceleration in post-industrial journalism — which, in a way, evokes the generalised acceleration of modern societies proposed by Harmut Rosa (2015) — is rooted in the notions of ubiquity and omnipresence of information and in the speed and anticipation of information as preponderant attributes in the salience of continuous information flows. Ultimately, it is a form of always doing something and in the shortest space of time, in 24-hour cycles and in pressurised times within a sped-up format, where the maxim "the value of information does not survive the moment in which it is new. It lives only at that moment" (Benjamin, 1968, p. 90), has never seemed so appropriate to the narrative of the problem.

This immediacy is thus one of the fundamental aspects of understanding how work routines and logics within newsrooms have changed and continue to change, and where the incessant search for new formats and innovative agendas have marked the path of an industry that is still trying to find a viable business model for news in the digital age (von Rimscha, 2016).

This immediacy, in the words of Beckett (2010), leads to a kind of melting pot of dubious news material and content that have become necessary to know how to avoid. A scenario in which investigative journalism, specialised and based on the expertise that results from performing the task to the fullest, is challenged by a type of journalism based on continuous information flows capable of responding to the monetisation strategies of media organisations. An immediacy that, apart from anything else, has already consolidated itself into a kind of procedural norm (Buhl et al., 2017).

And even though journalists still try to combine immediacy and accuracy in news production (Mir, 2014), it seems wise to bring up the words of Fenton (2010) and Karlsson (2011), when they point out that immediacy is nothing more than a kind of catalyst for a certain type of breakdown in the social function of journalism. This breakdown has a direct impact on the quality of news production, which is increasingly exposed to errors, inaccuracies and replications, which in turn are the most obvious reflection of a practice that contributes to a growing professional deskilling.

An attempt is thus made to systematise the concept of deskilling (Figure 1), taking into account the different micro and meso levels that allow this concept to be used as a critical point in interpreting the hijacking of the quality of journalism and the obsolescence of its occupational ideology.

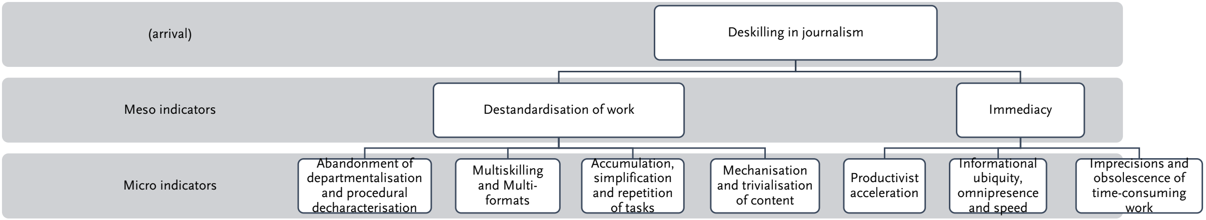

Figure 1. *Systematising the concept of deskilling in the journalism profession*

5. A New Form of Precarity Projected on to the Effects of Deskilling on the Quality of Journalism

The tradition of studies on professional precarity precedes, but also accompanies, the emergence of others that reflect on the historical transition to the information society and the global economy, as well as the way in which this transition is accompanied by the creation of precarious living and working conditions (Castells, 1996/2002).

A pivotal author in this field of study on professional precarity is Serge Paugam (2000; Paugam & Russell, 2000). This author is linked to an extension of Durkheimian thinking in the area of the degradation of employment and crises within social ties, and has devised a twofold typology of precarity: (a) work insecurity, associated with the instability of the employment relationship, which in the journalism profession is essentially associated with contingency links, piecework, and others not subject to the legal aspect of a salary, or issues such as the stagnation of professional careers, poor remunerative conditions, among others; and (b) the precarity of work, attributable to a process of domination/subordination through the acceptance of the exploitation of paid employment. This process normalises poor working conditions as a result of fragmented, flexible labour markets captured by generalised and permanent insecurity which, in journalism, is seen as an extension of the profession itself. A type of job insecurity that is reflected mostly in issues such as dissatisfaction and misalignment of work expectations, anguish and uncertainty (pathos), intense workloads that are often coercively extended and the consequent blurring of the boundaries between working hours and private life.

However, and considering the limit of the scope of the type of double precarity proposed by Paugam (2000; Paugam & Russell, 2000), the substance of the topic dealt with in this article would imply from the outset the introduction of a third type of precarity, which goes beyond formal employment arrangements and is associated with this aspect of deskilling in a profession such as journalism, which has been continually challenged in terms of the quality of its practice.

A new type of precarity of practice is therefore proposed that differs from the precarity of employment and the discussion of the traditionally dominating bonds that are at play in the new global economic orders. A new type of precarity that also goes beyond work insecurity and the characteristics resulting from the subordination to these ties, which have a strong impact on the well-being and personal aspect of the worker (precarity of work).

This is the kind of precarity that best explains the drift in journalism towards a decline in the quality of its practice, the representation of which has been attempted by other authors, such as in the proposal for a definition of precarious professionalism within journalism (Matthews & Onyemaobi, 2020).

In this regard, authors such as Cohen (2017) point out that the plethora of challenges imposed on journalism, represented by precarious working conditions, have a marked influence on the quality of journalistic activity. This idea is shared by Morini et al. (2014), who state that the professionals themselves are aware that precarity affects the quality of their work and recognise that news quality models have deteriorated.

In other words, a melting pot of influences that has repercussions on a weakened practice that can also, in the view of Chadha and Steiner (2022), have a perverse effect on the historic umbilical relationship between journalism and democracy. A kind of precarity of practice that is normalised in the intricate complex that leads to the pauperisation of the classic economy of traditional media and which subsequently results in, (a), the advance in processes leading to professional dequalification (Chadha & Steiner, 2022; Wasserman, 2019) and, (b), the erosion of the functionalist ideal of journalism as legitimised by quality content and high levels of professionalism (Örnebring, 2018). It is also a type of precarity that is little discussed, but which influences journalists' own ways of thinking (Örnebring, 2018). Indeed, according to Gutiérrez-Cuesta et al. (2022), the precarious contexts of practice are the largest factor affecting professional routines and, ultimately, the quality of the texts published by different brands.

And even if the set of concepts used to justify this precarity of practice does not have a consolidated format like that proposed in this article, authors such as Cohen (2017) have already alluded to a precarity of practice associated with a process of destandardisation of journalistic work, which will come to rely on trivialised information generated by software and on the writing of unoriginal content. Processes that Banet-Weiser (2017) describes as being primarily explainable in the light of an organisational transformation, where journalists, in order to respond to the hypercompetitive impetus of the profession, transfer their subjectivity as workers to the languages and practices of journalistic entrepreneurship.

One of the main examples is the new procedural dictatorships imposed on journalists, such as metrics, which override the historical normative substance of journalism. Or, in other words, procedural dictatorships that nowadays have more economic value than the quality of the news content itself (Murdock, 2018), thus subverting the idea of journalism as a profession based on an ideology that assumes a commitment to the quality of the work rather than the principle of the economic efficiency of that work (Witschge & Nygren, 2009). The result is a superimposition of the desires of technocratic media management and market imperatives on the quality of journalism and the news content produced, resulting in a precarity of know-how, which implies assuming as a hypothesis the negative correlation between levels of precarity of practice, as a consequence of the disruptive environments imposed on journalism and the quality of journalism itself.

In essence, a growing precarity of practice (Figure 2), which appears to be associated with the conditions of permanent, diffuse and chaotic change that are plaguing journalistic practice in the post-industrial era of news, and which entails a disabling of know-how that is thus becoming increasingly precarious in its historical relationship with the quality of practice, and which may put journalists themselves, as Morini et al. (2014) point out, in a permanent conflict between their professional calling and disillusionment.

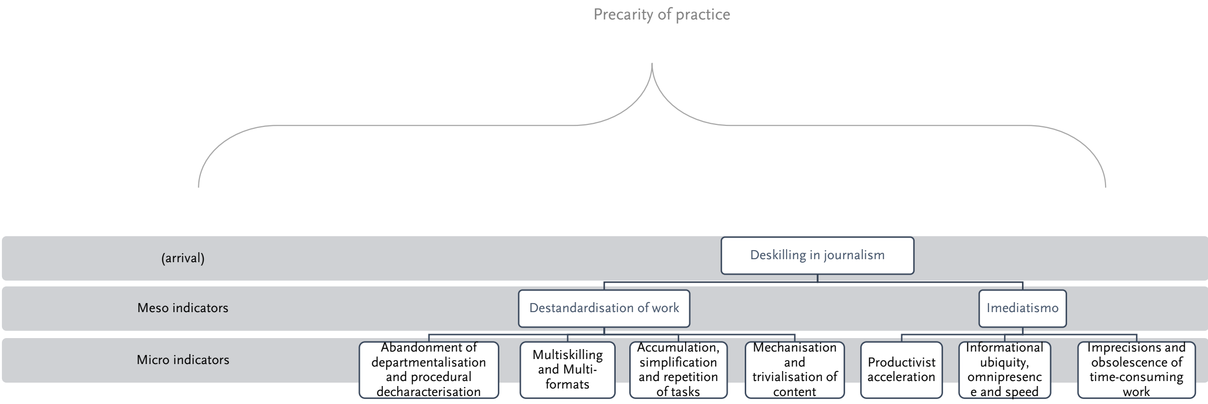

Figure 2. *Deskilling in the journalism profession as a new form of precarious practice?*

6. Conclusion

This article began by situating the issue of professional deskilling in journalism as an object of study that can mainly be found in the theoretical heritage of studies by leading authors in the field of communication sciences.

Contrary to that which happens in other areas, where the discussion on professional deskilling seems more consolidated, the conceptual polysemy that permeates the ecosystem of the challenges imposed on post-industrial journalism means that it has not yet been possible to work on the concept, and its different compositional layers, in a more structured way.

Given this, the added value of this work, which aims to fill in the gaps identified in the knowledge produced, consisted of proposing a systematisation of the concept of deskilling within the journalism profession, relating the product of this systematisation to the aspect of quality in journalism.

It was concluded that the meanings of the abandonment of departmentalisation and procedural decharacterisation; the accumulation of formats and tasks; labour simplification and repetition; the mechanisation and trivialisation of the work product; productivist and ubiquitous acceleration; and the upsurge of imprecision resulting from the obsolescence of time-consuming activity, can help consolidate a maximalist definition of what deskilling within the profession truly consists of. This deskilling is subsumed within the two key words capable of bringing together its different meanings. These are the concepts of "destandardisation of work" and "immediacy", which together consolidate the deskilling tendencies of the profession and help position this debate within a new type of precarity of practice. A kind of precarity of practice that characterises one of the professions most susceptible to the disruptive rhythms of information technology, as is the case with journalism, and which has implications for the quality of journalism and the deterioration of the journalistic product.

7. Future Paths or the Ambiguous Impact of Automation on the Deskilling of Journalistic Practice

As was seen earlier, the literature tells us that professional deskilling became more acute with the last major phase of the technological revolution, as well as with the standardisation and simplification of tasks supported by the information infrastructure, with documented consequences for the quality of journalism. However, some of this same, more recent literature also concludes that one of the main positive points enhanced by the integration of "industry 4.0" and automation in professional occupations, particularly in journalism, is the ability to free up the human factor in newsrooms from the simplest most tedious tasks in order to embrace more complex ones, such as investigative journalism (Lindén, 2017; Thurman et al., 2017; van Dalen, 2012). This brighter side of what the technological infrastructure offers to journalism and journalists makes it necessary to consider the idea of professional reskilling and the rescuing of quality journalism supported by an infrastructure that takes care of the trivialised tasks of the profession.

However, this is an idea that does not meet with consensus, as other hypotheses such as the reinforcement of the continuous and progressive withering away of skills (Carlson, 2014) — more deskilling — and the neoliberal hypothesis projected in professional redundancy (Conboy, 2019), are also being put forward.

In this sense, it is felt that it is important to continue to monitor the dynamics of transformation in journalism and how these impact the professional skills of journalists and the quality of journalism. Therefore, the issue of automation in journalism is one of the new topics that will arouse the most interest, on the one hand, in monitoring the possible strengthening of the dynamics of deskilling, or on the other hand, in its corresponding antipodes of reshaping contexts involving professional reskilling. At the end of the day, the automation applied to journalism may be a mere reinforcement of rationalisation mechanisms: rationalisation of resources in the form of laying off workers and through the release of many other operational costs by the organisational top management, which are umbilically linked to a practice historically associated with the image of a time-consuming craft. To be followed.

Translation: Linguaemundi Language Services, Lda.

Acknowledgements

This article was written with financial support from FCT (Fundação para a Ciência e a Tecnologia – Portugal), reference FCT UIDB/05021/2020.

References

Abel, R. (2001). Lawyers. In N. J. Smelser & P. B. Baltes (Eds.), *International encyclopedia of the social & behavioral sciences* (pp. 8553–8559). Pergamon.

Agnew, A., Forrester, P., Hassard, J., & Procter, S. (1997). Deskilling and reskilling within the labour process: The case of computer integrated manufacturing. *International Journal of Production Economics*, *52*(3), 317–324. https://doi.org/10.1016/S0925-5273(97)00092-3

Allan, S. (Ed.). (2010). *The Routledge companion to news and journalism*. Routledge.

Anderson, C. W. (2019). Journalism as procedure, journalism as values. *Journalism*, *20*(1), 8–12. https://doi.org/10.1177/1464884918806732

Asahina, Y. (2019). Precarious regular workers in Japan. *Japan Forum*, *33*(4), 633–657. https://doi.org/10.1080/09555803.2019.1677745

Baba, M. (2015). Business anthropology. In J. D. Wright (Ed.), *International encyclopedia of social & behavioral sciences* (2nd ed., pp. 4–9). Elsevier.

Banet-Weiser, S. (2017). Venture labor, media work, and the communicative construction of economic value: Agendas for the field and critical commentary: The culture of continuous labor. *International Journal of Communication*, *11*, 2056–2058.

Bastos, H. (2014). Da crise dos media ao desemprego no jornalismo em Portugal. *Parágrafo: Revista Científica de Comunicação Social*, *2*(2), 38–46.

Beckett, C. (2008). *Super media – Saving journalism so it can save the world*. Wiley–Blackwell.

Beckett, C. (2010). *The value of networked journalism*. LSE; Polis.

Benjamin, W. (1968). *The storyteller.* Schocken Books.

Benkler, Y. (2006). *The wealth of networks: How social production transforms markets and freedom*. Yale University Press.

Benson, R. (2019). Paywalls and public knowledge: How can journalism provide quality news for everyone? *Journalism*, *20*(1), 146–149. https://doi.org/10.1177/1464884918806733

Bourdieu, P. (2001). *Contrafogos 2: Por um movimento social europeu* (M. S. Pereira, Trans.). Celta. (Original work published 2001)

Bowker, G. C., & Star, S. L. (2015). Science and technology, social study of: Computers and information technology. In J. D. Wright (Ed.), *International encyclopedia of social & behavioral sciences* (2nd ed., pp. 186–191). Elsevier.

Braverman, H. (1974). *Labor and monopoly capital: The degradation of work in the twentieth century*. Monthly Review Press.

Bruns, A. (2005). *Gatewatching: Collaborative online news production*. Peter Lang.

Buhl, F., Günther, E., & Quandt, T. (2017). Observing the dynamics of the online news ecosystem: News diffusion processes among German news sites. *Journalism Studies*, *19*(1), 79–104. https://doi.org/10.1080/1461670X.2016.1168711

Carlson, M. (2014). The robotic reporter. Automated journalism and the redefinition of labor, compositional forms, and journalistic authority. *Digital Journalism*, *3*(3), 416–431. https://doi.org/10.1080/21670811.2014.976412

Carr-Saunders, A. M., & Wilson P. A. (1933). *The professions*. Clarendon.

Carroll, J. M., & Mentis, H. M. (2008). The useful interface experience: The role and transformation of usability. In N. J. Hendrik & P. Hekkert (Eds.), *Product experience* (pp. 499–514). Elsevier.

Castells, M. (2002). *A sociedade em rede* (A. Lemos & C. Lorga, Trans.). Fundação Calouste Gulbenkian. (Original work published 1996)

Chadha, K., & Steiner, L. (2022). *Newswork and precarity*. Routledge.

Chambers, D., & Steiner, L. (2010). The changing status of women journalists. In A. Stuart (Ed.), *The Routledge companion to news and journalism* (pp. 49–59). Routledge.

Chen, K. W., & Sonn, J. W. (2019). Contingent proletarianization of creative labor: Deskilling in the Xianyou classical furniture cluster. *Geoforum*, *99*, 248–256. https://doi.org/10.1016/j.geoforum.2017.11.008

Cobos, T. L. (2017). New scenarios in news distribution: The impact of news aggregators like Google News in the media outlets on the web. In S. Tosoni, N. Carpentier, M. F. Murru, R. Kilborn, L. Kramp, R. Kunelius, A. McNicholas, T. Olsson, & P. Pruulmann-Vengerfeldt (Eds.), *Present scenarios of media production and engagement* (pp. 95–105). Edition Lumiére.

Cohen, N. S. (2012). Cultural work as a site of struggle: Freelancers and exploitation. *TripleC: Cognition, Communication, Cooperation*, *10*(2), 141–155. https://doi.org/10.31269/triplec.v10i2.384

Cohen, N. S. (2017). Venture labor, media work, and the communicative construction of economic value: Agendas for the field and critical commentary: Freelancing as the good life? *International Journal of Communication*, *11*, 2030–2032.

Cole, B., & Cooper, C. (2006). Deskilling in the 21st century: The case of rail privatisation. *Critical Perspectives on Accounting*, *17*, 601–625. https://doi.org/10.1016/j.cpa.2003.06.011

Compton, J. R. (2010). Newspapers, labor and the flux of economic uncertainty. In S. Allan (Ed.), *The Routledge companion to news and journalism* (pp. 591–601). Routledge.

Conboy, M. (2019). Journalism has no future: A hypothesis for the neo-liberal era. *Journalism*, *20*(1), 17–20. https://doi.org/10.1177/1464884918806752

Cottle, S. (2000). New(s) times: Towards a second wave of news ethnography. Communications. *The European Journal of Communication Research*, *25*(1), 19–41. https://doi.org/10.1515/comm.2000.25.1.19

den Bulck, V. (2018). Public service media in the networked society. What society? What network? What role? In G. F. Lowe, H. V. den Bulck, & K. Donders (Eds.), *Public service media in the networked society* (pp. 7–9). Nordicom.

Deuze, M. (2001). Online journalism: Modelling the first generation of news media on the world wide web. *First Monday*, *6*(10). https://doi.org/10.5210/fm.v6i10.893

Deuze, M. (2005). What is journalism? Professional identity and ideology of journalists reconsidered. *Journalism*, *6*(4), 442–464. https://doi.org/10.1177/1464884905056815

Deuze, M. (2007). *Media work*. Polity press.

Deuze M (2009). Journalism, citizenship, and digital culture. In Z. Papacharissi (Ed.), *Journalism and citizenship* (pp. 15–28). Routledge.

Deuze, M. (2017). Beyond journalism: Theorizing the transformation of journalism. *Journalism*, *19*(2), 165–181. https://doi.org/10.1177/1464884916688550

Deuze, M., & Yeshua, D. (2001). Online journalists face new ethical dilemmas: Lessons from the Netherlands. *Journal of Mass Media Ethics*, *16*(4), 273–292. https://doi.org/10.1207/S15327728JMME1604_03

Downey, M. (2021). Partial automation and the technology-enabled deskilling of routine jobs. *Labour Economics*, *69*, a101973. https://doi.org/10.1016/j.labeco.2021.101973

Ertürk, K. A. (2019). Induced technology hypothesis. Acemoglu and Marx on deskilling (skill replacing) innovations. *Review of Social Economy*, *79*(1), 2–24. https://doi.org/10.1080/00346764.2019.1650291

Fenton, N. (2010). News in the digital age. In A. Stuart (Ed.), *The Routledge companion to news and journalism* (pp. 557–567). Routledge.

Ferris, T., Sarter, N., & Wickens, C. D. (2010). Cockpit automation: Still struggling to catch up. In E. Salas & M. Dan (Eds.), *Human factors in aviation* (pp. 479–503). Academic Press.

Forslin, J. (1990). Deskilling and reskilling. A longitudinal study of Volvo engine division. *IFAC Proceedings Volumes*, *23*(7), 73–84. https://doi.org/10.1016/S1474-6670(17)52139-4

Gamst, F. C. (2015). Work, sociology of. In J. D. Wright (Ed.), *International encyclopedia of social & behavioral sciences* (2nd ed., pp. 687–693). Elsevier.

Gutiérrez-Cuesta, J. J., Vink Larruskain, N., & Cantalapiedra M. J. (2022). Precariousness, an obstacle to journalistic quality: A case study. *Doxa Comunicación*, *35*, 113–125. https://doi.org/10.31921/doxacom.n35a1588

Hass, B. H. (2011). Intrapreneurship and corporate venturing in the media business: A theoretical framework and examples from the German publishing industry. *Journal of Media Business Studies*, *8*(1), 47–68. https://doi.org/10.1080/16522354.2011.11073518

Hermida, A. (2019). The existential predicament when journalism moves beyond journalism. *Journalism*, *20*(1), 177–180. https://doi.org/10.1177/1464884918807367

Hindman, M. (2018). *The Internet trap: How the digital economy builds monopolies and undermines democracy*. Princeton University Press.

Hirschhorn, L. (1988). The post-industrial economy: Labour, skills and the new mode of production. *The Service Industries Journal*, *1*, 19–38. https://doi.org/10.1080/02642068800000003

Hjarvard, S. (2012). The study of international news. In K. B. Jensen (Ed.), *A handbook of media and communication research: Qualitative and quantitative methodologies* (pp. 91–97). Routledge.

Jenkins, H. (2006). *Convergence culture: Where old and new media collide*. New York University Press.

Karlsen, J., & Stavelin, E. (2014). Computational journalism in Norwegian newsrooms. *Journalism Practice*, *8*(1), 34–48. https://doi.org/10.1080/17512786.2013.813190

Karlsson, M. (2011). The immediacy of online news, the visibility of journalistic processes and a restructuring of journalistic authority. *Journalism*, *12*(3), 279–295. https://doi.org/10.1177/1464884910388223

Kim, Y. J., Garrity, E. J., & Sanders, L. (2003). Success measures of information systems. In H. Bidgoli (Ed.), *Encyclopedia of information systems* (pp. 299–313). Elsevier.

Lindén, C.G. (2017). Algorithms for journalism: The future of news story. *The Journal of Media Innovations*, *4*(1), 60–76. https://doi.org/10.5617/jmi.v4i1.2420

Liu, C. (2006). De-skilling effects on journalists: ICTs and the labour process of Taiwanese newspaper reporters. *Canadian Journal of Communication*, *31*, 695–714.

Man, G. (2004). Gender, work and migration: Deskilling chinese immigrant women in Canada. *Women's Studies International Forum*, *27*(2), 135–148. https://doi.org/10.1016/j.wsif.2004.06.004

Manovich, L. (2020). *Cultural analytics*. The MIT Press.

Martinaitis, Ž., Christenko, A., & Antanavičius, J. (2021). Upskilling, deskilling or polarisation? Evidence on change in skills in Europe. *Work, Employment and Society*, *35*(3), 451–469. https://doi.org/10.1177/0950017020937934

Matthews, J., & Onyemaobi, K. (2020). Precarious professionalism: Journalism and the fragility of professional practice in the Global South. *Journalism Studies*, *13*(21), 1836–1851. https://doi.org/10.1080/1461670X.2020.1797524

Matos, J. N. (2017). "Mão de ferro e coração bom": Neopaternalismo e precariedade no mundo do jornalismo. In J. N. Matos, C. Baptista, & F. Subtil (Eds.), *A crise do jornalismo em Portugal* (pp. 149–157). Deriva Editores; Le Monde Diplomatique.

McQuail, D. (2007). Communication and technology: Beyond determinism? In N. Carpentier (Ed.), *Media technologies and democracy in an enlarged Europe* (pp. 27–40). University of Tartu Press.

Mir, I. (2014, July 8). *Immediacy: The new enemy for journalists*. The Calgary Journal. https://calgaryjournal.ca/more/calgaryvoices/2294-immediacy-the-new-enemy-for-journalists.html

Morini, C., Carls, K., & Armano, E. (2014). Precarious passion or passionate precariousness? Narratives from co-research in journalism and editing. *Recherches Sociologiques et Anthropologiques*, (45-2), 61–83. https://doi.org/10.4000/rsa.1264

Murdock, G. (2018). Reclaiming digital space. From commercial enclosure to the broadcast commons. In G. F. Lowe, H. Van den Bulck, & Karen Donders (Eds.), *Public service media in the networked society* (pp. 43–58). Nordicom.

Örnebring, H. (2009). *The two professionalisms of journalism: Journalism and the changing context of work* [Working paper]. Reuters Institute for the Study of Journalism.

Örnebring, H. (2010). Technology and journalism-as-labour: Historical perspectives. *Journalism*, *11*(1), 57–74. https://doi.org/10.1177/1464884909350644

Örnebring, H. (2018). Journalists thinking about precarity: Making sense of the "new normal". *#ISOJ Journal*, *8*(1), 109–127.

Örnebring, H. (2019). *Skills and journalism*. Oxford Research Encyclopedia of Communication. https://oxfordre.com/communication/view/10.1093/acrefore/9780190228613.001.0001/acrefore-9780190228613-e-830

Paugam, S. (2000). *Le salarié de la précarité*. Presses Universitaires de France.

Paugam, S., & Russell, H. (2000). The effects of employment precarity and unemployment on social isolation. In D. Gallie & S. Paugam (Eds.), *Welfare regimes and the experience of unemployment in Europe* (pp. 243–263). Oxford University Press.

Rodrigues, M. J. (2009). *Europe, globalization and the Lisbon Agenda*. Edward Elgar.

Rosa, H. (2015). *Social acceleration: A new theory of modernity*. Columbia University Press.

Rottwilm, P. (2014). *The future of journalistic work: Its changing nature and implications*. Reuters Institute for the Study of Journalism.

Saunders, P. (2001). Class: Social. In N. J. Smelser & P. B. Baltes (Eds.), *International encyclopedia of the social & behavioral sciences* (pp. 1933–1938). Pergamon.

Singer, J. B. (2004). Strange bedfellows? The diffusion of convergence in four news organizations. *Journalism Studies*, *5*(1), 3–18. https://doi.org/10.1080/1461670032000174701

Singer, J. B. (2010). Journalism in the network. In A. Stuart (Ed.), *The Routledge companion to news and journalism* (pp. 277–286). Routledge.

Sonwalker, P. (2019). From by-line to bottom-line: Trust deficit in world´s largest democracy. *Journalism*, *20*(1), 60–63. https://doi.org/10.1177/1464884918809270

Star, S. L. (2001). Science and technology, social study of: Computers and information technology. In N. J. Smelser & P. B. Baltes (Eds.), *International encyclopedia of the social & behavioral sciences* (pp. 13638–13644). Pergamon.

Steensen, S. (2016). The intimization of journalism. In T. Witschge, C. W. Anderson, D. Domingo, & A. Hermida (Eds.), *The SAGE handbook of digital journalism* (pp. 113–127). Sage.

Tandoc, E. C., Jenkins, J., & Craft, S. (2019). Fake news as a critical incident in journalism. *Journalism Practice*, 13(6), 673–689. https://doi.org/10.1080/17512786.2018.1562958

Thurman, N., Dörr, K., & Kunert, J. (2017). When reporters get hands-on with robo-writing. Professionals consider automated journalism´s capabilities and consequences. *Digital Journalism*, *5*(10), 1240–1259. https://doi.org/10.1080/21670811.2017.1289819

van Dalen, A. (2012). The algorithms behind the headlines. How machine-written news redefines the core skills of human journalists. *Journalism Practice*, *6*(5-6), 648–658. https://doi.org/10.1080/17512786.2012.667268

von Rimscha, M. B. (Ed.). (2016). *Managing media firms and industries: What's so special about media management?* Springer.

Waisbord, S. (2013). *Reinventing professionalism: Journalism and news in global perspective*. Polity Press.

Wall, T. D., & Parker, S. (2001). Job design, psychology of. In N. J. Smelser & P. B. Baltes (Eds.), *International encyclopedia of the social & behavioral sciences* (pp. 7980–7983). Pergamon.

Wasserman, H. (2019). Relevance, resistance, resilience: Journalism's challenges in a global world. *Journalism*, *20*(1), 229–232. https://doi.org/10.1177/1464884918809290

Witschge, T., & Nygren, G. (2009). Journalism: A profession under pressure? *Journal of Media Business Studies*, *6*(1), 37–59. https://doi.org/10.1080/16522354.2009.11073478

Wood, A. J., Graham, M., Lehdonvirta, V., & Hjorth, I. (2019). Networked but commodified: The (dis) embeddedness of digital labour in the gig economy. *Sociology*, *53*(5), 931–950. https://doi.org/10.1177/0038038519828906

Zelizer, B. (2015). Terms of choice: Uncertainty, journalism and crisis. *Journal of Communication*, *65*(5), 888–908. https://doi.org/10.1111/jcom.12157

Biographical Note

Tiago Lima Quintanilha has a PhD in communication sciences. His research interests include media studies, journalism, open science and open access, on topics ranging from the major challenges facing journalism to disruptions of the open access publishing model. Currently, his research and consultancy work focuses mainly on the link between journalism studies and science studies, particularly on the issue of scientific disruptions in the systematic accumulation of knowledge, taking as case studies certain areas that have been revisited within the field of journalism studies. He has published in Portugal and internationally, in different formats. His research has been published in journals such as *Communication & Society*, *Journalism*, and *International Journal of Communication*, among others.

ORCID: https://orcid.org/0000-0001-9189-481X
Email: tiagoquintanilha@fcsh.unl.pt
Address: Faculdade de Ciências Sociais e Humana - Av. de Berna, 26 C · 1069-061 Lisboa, Portugal

Submitted: 28/02/2023 | Accepted: 18/09/ 2023

Comunicação e Sociedade, vol. 44, 2023, e023020
https://doi.org/10.17231/comsoc.44(2023).4737

"I Don't Have the Necessary Conditions": How Television and Radio Journalists Rate the Quality of Journalism in Portugal

Marta Santos Silva
LabCom – Comunicação e Artes, Faculdade de Artes e Letras, Universidade da Beira Interior, Covilhã, Portugal

Abstract

Studying the quality of journalism in Portugal is important, given the current financial crisis the business landscape is going through, where newsrooms are increasingly smaller and with precarious working conditions. In this context, how do Portuguese television and radio journalists assess the quality of journalism practised in Portugal and the conditions they have to produce news? This article seeks to answer two research questions, through the use of semi-structured interviews with 11 radio and television journalists in Portugal: (a) how do television and radio journalists define quality journalism; and (b) how do television and radio journalists assess the quality of journalism produced in Portugal?

The interviewees stressed the importance of following the profession's ethical rules, maintaining accuracy and impartiality, as well as other more formal aspects, such as the quality of their writing or the ability to captivate their audience. As for the conditions needed to practise good journalism, the importance of time and job stability stood out, which the interviewees agreed are in short supply. Although the interviewees were not unanimous in their assessment of the quality of television and radio journalism in Portugal — even the most positive ones had criticisms to make — most of the journalists interviewed considered that their working conditions for producing good journalism fall short of what is desired.

Keywords

quality of journalism, interviews, television, radio, precarity

"Não Tenho as Condições": Como os Jornalistas de Televisão e Rádio Avaliam a Qualidade do Jornalismo em Portugal

Resumo

Estudar a qualidade do jornalismo em Portugal manifesta-se como relevante perante uma paisagem empresarial em crise financeira e redações cada vez mais pequenas com condições de trabalho precárias. Neste contexto, como é que os jornalistas portugueses de televisão e de rádio avaliam a qualidade do jornalismo praticado em Portugal e as condições que têm para o produzir? Através de entrevistas semiestruturadas a 11 jornalistas de rádio e de televisão em Portugal, procuramos responder a duas perguntas de investigação: (a) como é que os jornalistas de televisão e de rádio definem o jornalismo de qualidade?; e (b) como é que os jornalistas de televisão e de rádio avaliam a qualidade do jornalismo produzido em Portugal?

Os entrevistados destacam a importância de seguir as regras deontológicas da profissão, de manter o rigor e a isenção e também outros tipos de características mais formais como, por exemplo, a qualidade da escrita ou a capacidade de cativar a audiência. Quanto às condições necessárias para praticar bom jornalismo, sobressai a importância do tempo e da estabilidade laboral, sobre as quais os entrevistados concordam estarem em escassez. Embora não sejam unânimes na sua avaliação da qualidade do jornalismo televisivo e radiofónico em Portugal — mesmo os mais positivos têm críticas a fazer —, a maior parte dos jornalistas entrevistados considera que as suas condições de trabalho para produzir bom jornalismo ficam aquém do desejado.

Palavras-chave
qualidade do jornalismo, entrevistas, televisão, rádio, precariedade

1. Introduction

Portugal is one of the countries where people trust the news the most. The *Digital News Report Portugal 2022* (Cardoso et al., 2022) points out that 61% of the Portuguese say they trust the news, the highest figure in Southern Europe and the second highest in the whole of Europe, only behind Finland. The most trusted brand is public television, RTP. In addition, the Portuguese believe that the news in Portugal is not too polarised — in other words, that the media do not tend to exaggerate the differences between political parties and groups. Portugal has the lowest perceived polarisation score in the world, along with Singapore. These figures reveal a country where the relationship of trust between the media and their audiences has not yet eroded, contrary to the trend in other European countries and North America. It is also a country where the majority of people still consume information from television every week — 63% of people watch news on RTP, SIC or TVI at least once a week, according to the same report.

Given the considerable demand for television information and the still encouragingly high levels of public trust in the media, there is interest in studying the quality of journalism produced on Portuguese television, along with radio journalism, as a possible point of comparison to understand how widespread the perceptions in question are.

Over the last few decades, different techniques and approaches have been used to measure and assess the quality of journalism. Experts have proposed a variety of angles from which to study this subject, and these range from content analysis using different methods (Martins & Palacios, 2016; Palacios, 2011), to the study of the conditions that exist in media companies for the production of good journalism (Picard, 2000), as well as definitions and measures linked to the social and democratic role of journalism (McQuail & Deuze, 2020). Research into the quality of journalism in Portugal is still in its infancy, which indicates a need to understand better how Portuguese journalists and audiences define quality journalism and what assessments they make of it.

The issue of quality has also become particularly pressing at a time of financial crisis within journalism, which has led to a reduction in the number of newspapers and journalists in newsrooms. As journalists (Gómez Mompart et al., 2015) and institutions (Esteves, 2020) and academics (Meyer, 2009; Silva, 2020) point out, quality journalism cannot be achieved without investment — whether in human resources or in technological and technical resources.

As such, given the deteriorating financial conditions of media companies in Portugal, how do Portuguese journalists assess the quality of journalism practised in Portugal and the conditions in which they themselves have to carry out "good journalism"? This article aims to answer two research questions: (a) how do television and radio journalists define quality journalism; and (b) how do television and radio journalists assess the quality of journalism produced in Portugal?

To this end, this article begins by presenting some theoretical guidelines concerning the study of the quality of journalism and journalists' perceptions of quality. It then offers a few points to contextualise the evolution of the professional profile of the Portuguese journalistic class, the financial situation of media companies and the present-day working situation of journalists in Portugal. It then presents the methodology utilised in this study, namely semi-structured interviews conducted with 11 radio and television journalists in Portugal. Finally, it provides a contextualised analysis of the results of the study.

2. Theoretical Framework

2.1. The Study of the Quality of Journalism

It is often said that there is a "public interest" in a quality press, that is, that the press fulfils important roles in society and that the quality of its work is therefore in the common interest. These benefits of the press for society are manifold, including the systematic scrutiny of power, stimulating active democratic life, as well as creating opportunities to express ideas and perspectives about the world (McQuail & Deuze, 2020). There is a normative outlook from professionals who practise journalism about the quality they consider they have an obligation to achieve and there is an expectation, on the part of society, that the press should be held to a certain standard. This is partly due to the historical context of journalism, with its role having been defined as a link between political institutions and citizens. Research into the quality of the press often focuses on its ability to fulfil this normative role. McQuail and Deuze created the concept of *media performance* to talk about the quality of journalistic content, with a definition based on five values: freedom, equality, diversity, quality of information and truth, and social order and solidarity.

However, not all definitions of journalistic quality are associated with these concepts of public service. Picard (2000), for example, takes a more economistic approach: "the concept of quality involves providing value for the money or time expended by consumers to obtain and use a product or service" (p. 97). In order to define the quality of journalism, the author proposes an approach based on the time spent by the journalist during the working process and points out seven categories of activity to be quantified mainly by the time spent on them. For example, this includes activities such as "interviews", "being on the phone gathering information and arranging interviews", "participating in editorial meetings, discussions and training sessions" and even "thinking, organising material, and waiting for information and materials" (Picard, 2000, p. 101).

Where Picard (2000) focuses on time, Lacy (2000) suggests measuring the quality of journalism through financial investment. An idea that first appeared in 1986, proposed by Litman and Bridges, is that the measurement of the quality of journalism can be achieved by gauging the newspaper company's financial investment in the product. "This concept of performance is not an evaluation per se of the product itself but rather of the resources put forth by a newspaper to produce and deliver such a quality product" (Litman & Bridges, 1986, p. 10). Lacy (2000) points out that, although more money is not a guarantee of quality content, nor is it the only factor at play, a news organisation needs financial support to produce it:

> ask any newspaper editor if money guarantees quality journalism, and the editor will likely deny it. Yet, ask that same editor if money can help him or her improve the quality of news reporting, and the answer will be "of course". (p. 25)

As such, financial investment has value as a tool for measuring the quality of journalism, argues Lacy (2000), because funding is crucial for producing quality content consistently over time.

Others have sought to define quality journalism based on the criteria of the professionals who develop it. Rosenstiel et al. (2007), as part of the *Project for Excellence in Journalism*, developed a list of criteria that define good quality local television news, based on surveys and interviews with journalists who produce this type of news. The journalists questioned as part of this research felt that a good newscast should meet seven criteria, namely, cover the whole community, cover substantive and significant issues, show courage, be fair, be accurate, show authority and not sensationalise.

These are criteria that appear in various research projects concerning what journalists value in quality news, such as Gladney's (1996) work. The journalists in Gladney's study prioritised certain criteria for the quality of journalism, including "integrity, impartiality and editorial independence" when it came to the criteria for news organisation, and "strong local coverage, accuracy and good writing" (p. 327) when it came to the criteria for the content itself. The author sought to understand whether journalists and audiences valued similar characteristics in quality journalism and concluded that, for the most part, professionals and readers indeed had similar standards for journalistic excellence. This study also showed that journalists seem to underestimate readers' interest in serious topics and exaggerate their "appetite for superficial material", while readers are "more discreet and restrained than editors in deciding what is fit to print" (Gladney, 1996, p. 328) — readers valued a less sensationalist approach from newspapers more than journalists themselves.

This proximity between the criteria for journalistic quality identified by the public and by professionals has been shown in several other studies, including the one by Odriozola-Chéné and Rodrigo-Mendizábal (2017) in Ecuador, where the authors surveyed audiences and interviewed 40 journalists to find out which criteria were most valued and also which conditions were necessary for the development of quality journalism.

The authors found several points of convergence, for example, in the importance given to the significance, clarity and accuracy of the information. "citizens and journalists share a set of values when it comes to determining what is important", the authors wrote, and "the correct identification of sources contributes to citizens' perception that the news are representative of the events reported" (Odriozola-Chéné & Rodrigo-Mendizábal, 2017, p. 186). However, the public considers that impartiality and reliability are hardly present in Ecuadorian news and journalists justify this by saying that there are professional, hierarchical and external constraints that make it difficult to produce quality journalism. For journalists, political pressure appears to be the greatest constraint on the development of quality journalism, followed by other pressures, such as audience expectation.

2.2. Journalists' Perceptions of Quality

It is not only important to understand what criteria journalists use to define quality journalism, but also how they assess the current state of journalism, including the work they themselves do. This article has chosen to highlight three studies (Gómez Mompart et al., 2015; Jenkins & Nielsen, 2020; Plasser, 2005) that assess journalists' perceptions of the quality of journalism and which seem to highlight some cross-cutting trends.

Plasser (2005) compared United States and Austrian political journalists' perceptions of news quality and found "striking" similarities (p. 64). On both sides of the Atlantic, journalists question the good quality of political news: in Austria, more than 50% of the journalists interviewed believed that the quality of political journalism had declined in previous years and only 19% thought it had improved. The causes of these quality-related problems were market pressures and the hypercommercialisation of the journalistic product, which also had consequences for interaction with sources. However, although political journalists in both countries were very critical of news quality, "there are no indicators that they are willing to reduce their professional standards of news gathering and reporting" (Plasser, 2005, p. 65).

Jenkins and Nielsen (2020) found similarities in the qualities that local newspaper journalists mentioned as essential in Germany, France, the United Kingdom and Finland. The interviewees mainly emphasised the values of proximity, public service and popularity of content. They did, however, have criticisms to make, including the difficulty of producing more content with fewer journalists while trying to maintain high standards of editorial quality. The editors and journalists interviewed stated that it is increasingly difficult to cover communities in a way that provides the information necessary for readers to be active citizens, due to the time pressures of the digital environment and the reduction in profits, readers and journalists per newsroom. Certain elements of quality journalism and the resources to produce this have reached their limits. Jenkins and Nielsen (2020) thus found a "cross-national local news ecosystem" (p. 251) in which journalists generally try not to lower their high standards for quality journalism while trying to maintain the sustainability of their under-resourced media outlet.

In Spain, Gómez Mompart et al. (2015) surveyed 363 journalists to find out how they assess quality in the media outlet where they work, using various criteria, and found general dissatisfaction. For example, only half of journalists considered that the percentage of significant information in their media outlet is sufficient, although significance is one of the criteria they consider to be essential. The same goes for a media outlet's ability to offer original content.

Good quality information requires a financial investment that "companies are not willing to make" (Gómez Mompart et al., 2015, p. 20), according to 34% of those questioned. Many journalists also pointed out the lack of job stability — 28% stated there is little job stability in the profession and 34% said that only half of the workers have such stability. The perception of precarity and salary levels varies according to age (those with fewer years of experience view these aspects more unfavourably) and also according to the type of media (in television, salary and stability levels are the highest).

Gómez Mompart et al. (2015) found a tendency among Spanish journalists to blame companies for most of the quality problems in journalism, "especially with regard to the lack of investment to improve production conditions" (p. 29). Another problem pointed out, as reported by journalists in Jenkins and Nielsen's study (2020), is the need for speed, which hinders the process of quality assurance and analysis of topics in depth.

2.3. The Evolution of the Journalist's Profile in Portugal

While it is true that there are many common traits within the profession of journalism at the international level, and that American and European currents differ, it is also indisputable that Portuguese journalists and journalism have developed in a particular society that has endowed them with their own distinctive traits. As Correia and Baptista (2007) wrote, the professionalisation of journalism in Portugal took place mainly under the dictatorship, in the face of political constraints which, however, did not prevent the creation of a specific *ethos* for the profession:

> independence, accuracy, the denunciation of injustice and the pursuit of social justice have never left the profession's legitimising discourses, even if the reality imposed by the censorship clearly devalued these and, in many cases, prevented operations involving choice, selection and interpretation essential to making these a reality. (p. 32)

Between the 1950s and 25 April 1974, many changes were to take place inside and outside Portuguese newsrooms, with the aim of shaping the professional identity of the Portuguese journalist, a process that would continue beyond the revolution and up until the present day. While during the 1950s, journalists had no specific training in communication and much more value was placed on learning the "craft" in a newsroom and with colleagues, little by little a trend towards professionalisation began to emerge, requiring specific educational training. Journalists had low social status and there was resistance within the profession to the creation of professional courses: at the time, many texts only acknowledged "the newsroom as the special and exclusive space for the learning required to perform the 'craft'" (Correia & Baptista, 2007, p. 400). It was not until 1968 that the Journalists' Union managed to create the first journalism training course, and there was still a long way to go for consensus being reached among professionals on the need for this institutionalisation.

Even during the dictatorship, journalists coordinated efforts to improve their working conditions in terms of their salaries and careers, and the growing dignity of the profession created space for them to define their own ethical and deontological principles as well as specific journalistic values, that is, the concepts of "impartiality" and "accuracy" and the idea of public interest gained ground, even under the yoke of censorship (Correia & Baptista, 2007).

Any characterisation of Portuguese journalists as a group, however, remained somewhat rudimentary until Paquete de Oliveira, who in 1987 carried out the first sociological analysis of this professional group and the following year published the article "Elementos Para uma Sociologia dos Jornalistas Portugueses" (Elements Towards a Sociology of Portuguese Journalists). The knowledge we have today about the evolution of the journalistic class is largely due to the surveys of Portuguese journalists he carried out with José Luís Garcia, seeking not only to discover the sociological characteristics of journalists, but also their concerns and objectives within the profession (Crespo, Azevedo, & Cardoso, 2017).

The composition of the journalistic profession in Portugal continued to evolve until the end of the 20th century: while in 1974 there were 700 registered journalists, in 1996 there were 4,300, according to Fernando Correia (1997), who clearly attributes this increase to "the diversification and growth of the media (specialised magazines, new radio and TV stations)" (p. 42). During the 1980s and 1990s, the profession was not only revitalised, but also feminised, and efforts to increase education also bore fruit — in 1992, 35% of journalists had studied social communication (Correia, 1997).

In little over two decades, at the time of the survey by the Centre for Research and Studies in Sociology — University Institute of Lisbon: "Os Jornalistas Portugueses São Bem Pagos? Inquérito às Condições Laborais dos Jornalistas em Portugal" (Are Portuguese Journalists Well Paid? Survey on the Labour Conditions of Journalists in Portugal), carried out in 2016, there was a balance between genders, with men and women standing at 51.8% and 48.2% respectively. Regarding education, professionals with specific training more than doubled, with around two thirds of journalists possessing a higher educational degree in communication sciences, social communication or journalism (Crespo, Azevedo, Sousa, et al., 2017).

Inseparable from the evolution of journalists' sociological profile was the progress in their labour situation — Paquete de Oliveira pointed out back in 1994 that the average journalist's salary was "clearly lower than the average salaries earned by professionals in well-established professions such as doctors and lawyers" (Garcia & Oliveira, 1994,

p. 37). Correia (1997) even wrote that the fact that journalists were not self-employed, but employees, made them more vulnerable as professionals, for example, in the case of precarious or poorly paid labour contracts, which interfered in both their personal and professional lives, and also in their freedom to follow the deontology and principles of professional ethics that should govern them. Therefore, they had less power to resist corporate or managerial pressures.

Precarious labour situations and low salaries are still common among Portuguese journalists today. Miranda (2021) maps out how demands for better working conditions are a common theme in the conclusions reached at all four Portuguese Journalists' Congresses. The author also points out that through the different congresses there is the same concern with "demands (...) on the class itself", such as a lesser concern "with quantity and speed, and more with the quality and weight of the information" (Miranda, 2021, pp. 26–27). Miranda (2021) even mentions a framework of demands that includes, over the decades, "concerns about the quality of information and its regulation, or judgements about best practices and ways of carrying out their activity" (p. 29).

In her book, Felisbela Lopes (2015) interviewed a hundred Portuguese journalists about what they considered to be the greatest factor conditioning press freedom. The author found that one of the factors most mentioned had to do with economic and labour concerns, involving the same reasons that Correia had mentioned in 1997 — the impact that precariousness and low salaries have on journalistic production and practice:

> one of the greatest constraints on press freedom in Portugal lies in the self-censorship that precarious, freelance or fearful journalists are forced to resort to (sometimes automatically or unconsciously) in order to stay in the labour market. - Andreia Azevedo Soares, *Público*. (Lopes, 2015, p. 9)

In 2017, two-thirds of Portuguese journalists stated they had already considered leaving journalism, with the most frequent reasons being low income (21%), deteriorating working conditions (20.4%) and precarious contracts (14.3%), which once again emphasises how worrying the labour situation of Portuguese journalists remains (Crespo, Azevedo, Sousa, et al., 2017).

2.4. The Business View of the Journalism Crisis in Portugal

For more than three decades, newspaper advertising revenues have been falling in most developed countries, if calculated according to the percentage of gross domestic product (Cagé, 2016). Partly due to a reduction in available funds, and also due to the media companies' goal of producing higher revenues in relation to costs (in the case of the press quoted on the stock exchange, for example, which is obliged to produce profits for its shareholders). Newspapers are shrinking in number and, in those that remain, the number of journalists is decreasing. Between 1997 and 2007, the number of people working in the press in the countries of the Organisation for Economic Co-operation and Development fell by between 10% and 30% (Peters, 2010).

In Portugal, in 2004, there were 2,089 periodicals, but by 2020 this figure had already reduced to 886 (Pordata, n.d.). There has also been a reduction in the number of professionals in recent years. Indeed, the country lost 1,218 journalists in seven years (between 2007 and 2014), according to the Professional Journalist License Commission (Morais, 2015).

What is more, the employment status of those who remain in the profession is not a favourable one. According to the report *Jornalistas e Condições Laborais: Retrato de uma Profissão em Transformação* (Journalists and Labour Conditions: Portrait of a Profession in Transformation; Crespo, Azevedo, Sousa, et al., 2017), more than half of the journalists surveyed had not progressed in their careers for more than seven years. Almost 70% of journalists were dissatisfied with "developments in working conditions in the sector in recent years" (Crespo, Azevedo, Sousa, et al., 2017, p. 21). Of the 60% of journalists who said they worked more than 40 hours a week, 13% indicated a working week of 51 to 60 hours and 9% worked more than 60 hours a week. Moreover, although in most cases contracts provide for between 35 and 40 hours of work per week, 63% of journalists said that overtime was not compensated, either in money or in time off.

The situation has only worsened since 2020, due to the pandemic situation the world was plunged into. In Portugal, during the first 14 months of the COVID-19 pandemic, more than a hundred journalists were fired, according to data from the Portuguese Journalists' Union (Lusa, 2021).

In its 2020 report, *Relatório de Regulação 2020: Análise Económico-Financeira do Setor de Media em Portugal* (Regulatory Report 2020: Economic and Financial Analysis of the Media Sector in Portugal; Esteves, 2020), the Portuguese Regulatory Authority for the Media analysed the contraction of the advertising market caused by the COVID-19 pandemic. "The advertising market contracted by 4.2% overall" (Esteves, 2020, p. 8), stated the report, which pointed out, however, that in Portugal television news continued to be the main source of revenue for media companies. For example, in the cases of Impresa and Media Capital, advertising accounted for around 65% of revenues (in contrast, for example, to RTP, with a percentage closer to 10%). The public sector ended up being better protected from the drop in advertising revenue, as was the case with Agência Lusa and RTP. In April 2020, the government chose to support the press by purchasing € 15,000,000 of institutional advertising in advance.

A study by the Professional Journalist License Commission and the Journalists' Union in partnership with academic institutions, titled *Estudo Sobre os Efeitos do Estado de Emergência no Jornalismo no Contexto da Pandemia COVID-19* (Study on the Effects of the State of Emergency on Journalism in the Context of the COVID-19 Pandemic; Camponez et al., 2020), concluded that the pandemic had increased trends related to the precarity of journalists' work. Almost half of the 799 respondents who worked in journalism had a monthly income of less than € 900, and "only around half had permanent employment contracts" (Camponez et al., 2020, p. 15). For example, looking at freelance journalists, many of those surveyed were either in this situation because of difficulties in obtaining a work contract (35%) or were only formally self-employed (20%), as they had "conditions characteristic of a dependent worker" (p. 16).

In Portugal, the future financial scenarios for the media were summarised into four hypotheses by Cardoso et al. (2015). The first would be the development of journalism in reconverting to the digital medium, which would generate new value propositions capable of sustaining it. The second would be "short-term management", the "usual" solution of restructuring companies and their human resources with redundancies and changes to the cost structure. The third would be where part of the value of journalism would be paid for by paywalls and by costs sustained by content aggregators such as Google. Finally, there would be a solution that separated journalism "as an economic reality" from journalism "as a social function", so that journalism no longer depended on its economic viability and profit, but would rather be maintained by "non-economic forms of financing" such as donations, crowdfunding, sponsorships and state subsidies.

3. Methodology and Research Questions

This research proposes to explore the issues of journalism quality from the perspective of those who produce it, thus seeking to answer the two research questions mentioned above: (a) how do television and radio journalists define quality journalism; and (b) how do television and radio journalists assess the quality of journalism produced in Portugal? On the one hand, this research seeks to discover what criteria journalists use to define "a good piece" for television or radio, including the particular characteristics that these media require, and to know what conditions are necessary to produce such a "good piece". Furthermore, it seeks to learn how these journalists see journalistic production in Portugal in relation to the criteria they themselves establish, including their own work and the conditions under which they actually practise their profession. A path is thus traced between the normative perspectives of what journalism should be and the descriptive perspectives of what journalism actually is.

As a first approach to the issues of journalism quality among information producers in Portugal, it was opted to carry out semi-structured interviews, a qualitative methodology, despite the fact that international articles on this subject often use surveys as their main method, such as Gladney (1996) or Gómez Mompart et al. (2015). Instead, like Jenkins and Nielsen (2020), the semi-structured interview was chosen. This does not rule out the possibility of later on using the knowledge gathered in this process to carry out a broader survey.

The interview script used, with slight variations, as is natural in the case of semi-structured interviews, consisted of six questions, divided into two blocks. The first explored the characteristics that the journalist attributes to quality journalism, their definition of "good journalism" and the ideal conditions needed to produce this. The second was focused on assessing the quality of television or radio journalism in Portugal, depending on the interviewee's area of work, and assessing their own working conditions in relation to the ideals they described.

"Interviews are essential when you need/want to map the practices, beliefs, values and classification systems of specific, rather well-defined social universes, where conflicts and contradictions are not clearly explained", explains Duarte (2004, p. 215). The semi-structured interview allows the interviewee to articulate specific concerns and needs and the interviewer to better explore topics about which they may still have insufficient knowledge (Williamson, 2018).

A total of 11 interviews were carried out between 21 March and 6 April 2023. Five of the journalists interviewed worked for television channels: SIC (1), RTP (2) and CNN Portugal (2); and six worked for radio news programmes: Antena 1 (3), TSF (2) and Renascença (1). The journalists interviewed had been working for between three and 22 years. Most of the interviews were conducted via Zoom, three of them by telephone and one in person. The interviews lasted between 12 and 53 minutes, with the total number of interviews recorded totalling 3 hours and 48 minutes. One of the interviews was not recorded due to a technical error, and its analysis relies on the notes taken during the conversation, so there will be no direct quotes from it.

The journalists' answers were anonymised so as not to identify the name of the interviewee nor the media outlet where they work. The interviewees were informed of this anonymisation at the beginning of the interview process. This decision was made especially because of the questions in the second block of the interview, one of which is: "do you think you have the conditions to practise journalism with the quality you would like to achieve?". Due to the limited size of newsrooms in Portugal, it is felt that the identity of the journalists interviewed would be decipherable if their means of communication were associated with their years of career or their answers, and therefore, in order not to restrict the criticisms they might wish to make, this information will not be associated with each other.

The interviewees were initially chosen for convenience — four of the journalists were personal contacts — and, later, through snowballing or chain referencing, in which the initial interviewees referred to colleagues in the same and other media organisations. In an attempt to include journalists from all the national news media in the fields of television and radio, an attempt was made to contact journalists from CMTV and Rádio Observador. However, within the timeframe set for this article, no response was received from these journalists such that interviews could be carried out, better to complement this work.

By the ninth, 10th and 11th interviews, the answers began to provide no new information in relation to those previously recorded, thereby reaching a point of theoretical saturation (Thiry-Cherques, 2009), so it was decided to cease data collection and start analysing it.

The interview responses were organised in a table for qualitative analysis, considering individual perspectives, in the words of each interviewee, and collective views. This approach revealed convergences, divergences, and patterns in various viewpoints.

4. Results and Discussion of Findings

The 11 journalists interviewed for this research work showed varying assessments of the quality of journalism practised in Portugal, but common opinions on what a "quality" piece of journalism is. Asked about "the essential characteristics of quality journalism", the interviewees were divided between deontological or public service aspects and formal characteristics. Six of the journalists mentioned accuracy and impartiality, and two of those specifically mentioned respect for the profession's deontological rules, showing a connection to the journalistic *ethos* that goes back to the times when their colleagues worked under the dictatorship (Correia & Baptista, 2007). Four journalists spoke of the importance of diversifying sources. In contrast, five of the interviewees spoke of more formal characteristics of journalistic work, such as the "quality of the writing", with the ability to "grab" the listener or viewer, clear and explanatory language and an original and interesting approach. These formal characteristics also appear in the literature as priorities for journalists, as was the case in Gladney's (1996) work.

As regards the specific characteristics of quality television and radio journalism, almost all interviewees mentioned the quality of the image and sound, as would be expected, but other points were also raised. One of the radio journalists who was interviewed mentioned how, due to the limited length of news programmes, radio has to be able to "go to the heart of the matter" more than television, making it more difficult for this medium to fall into the dynamics of *infotainment* (Journalist 2). One of the radio journalists (Journalist 6) refers to the importance of using sound to verify the facts that are presented, including testimonies and other sounds in addition to the journalist's narration. A television journalist (Journalist 11) pointed out that it is essential to "scrutinise videos and other amateur content" shown on television, and gave the example of the earthquake in Turkey in February 2023, following which images were broadcast on television that were circulating on social media, some of them not associated with the event in question and with wrong dates or locations (Almeida, 2023).

With regard to the conditions necessary for a journalist to be able to practise good journalism, two themes were generally mentioned, namely time to work and good working conditions, especially remuneration. Seven out of 11 interviewees spoke about the importance of time: "time is the first condition" (Journalist 1); "first and foremost, time, the scarcest resource in journalism" (Journalist 8); "the team should be large enough so that there are no time pressures" (Journalist 4); "above all, time: we have to do everything for yesterday and deadlines make it difficult to get to know all sides of the news" (Journalist 11). As Picard (2000) points out, when wishing to use the time spent on tasks to measure the quality of journalism, journalists justify the need for time for various reasons: listening to different sources, undertaking investigations and reports, and reviewing and verifying facts. Two cases (Journalist 4 and Journalist 8) identified the reason for the lack of time, which was the scarcity of human resources, which makes it difficult to free up a journalist to work on a story instead of contributing to current affairs on a daily basis. In another case, the pressure from the competition and the need not to fall behind other channels or radio stations were emphasised. The pressures of time and competition (which are, after all, interlinked in the need to be there first and get "the scoop") may have already been present in the 1990s, as Correia (1997) wrote, but they have worsened with digitalisation and are highlighted in more contemporary literature on the quality of journalism, such as among those interviewed by Jenkins and Nielsen (2020). In six cases, journalists spoke of the obstacle to journalistic quality, that is, the precariousness of the profession. Professional stability, as two of the interviewees said, is important not only because of the good working conditions it provides for journalists, but also because it is reflected in the work they do. On the one hand, a journalist with a precarious labour situation is "less free", that is, more susceptible to pressure on their work and may fear "reprisals". Furthermore, only in good conditions can journalists "have other experiences and interact with the world" outside the newsroom (Journalist 4), where they will find stories and topics that they would not otherwise come into contact with. One of the journalists spoke about the importance of good pay "in order to be motivated and attract good professionals" (Journalist 9). "Journalism is increasingly a precarious profession and this affects the quality of the journalism that a person does" (Journalist 7). These testimonies are not surprising, partly because they are represented, albeit through the prism of press freedom rather than quality, in Lopes (2015), and partly because they are, in fact, concerns that run through the history of journalism in Portugal, as was seen above in Correia (1997). In this case, however, the association between the quality of journalistic work and job insecurity is directly made by the interviewees.

Six of the interviewees also mentioned the help of editors and managers, who support the journalist's independent work and help develop ideas and stories, as being an essential condition. The ideal managers are described by journalists as those who give journalists the freedom (and also the oft-mentioned time) to work and who have "the vision to coordinate" (Journalist 1).

Other conditions mentioned by journalists include the journalist's own preparation for the work they are going to do, their ability and opportunity to specialise in certain topics, good teamwork with technicians and editors, technological resources such as quality recorders and cameras and financial resources for travel, and freedom and security in regards to the political pressures and interests or from other sources.

When asked about the quality of television journalism in Portugal, the five television journalists interviewed had very different views. One journalist stated that, compared to "other countries" such as Spain and Italy, Portugal has good quality television journalism because in Portugal news programmes are the most watched television products, which "forces us to be more careful because there are a lot of people following them" (Journalist 10). This journalist spoke of a generalised concern to show well-filmed images and to have recorded testimonies in the pieces, something he does not see in the foreign news programmes he knows.

The rest of the television journalists, to varying degrees, are dissatisfied with the quality of television journalism. One of them rates it "6.5 out of 10", noting only that "sometimes innovation is lacking a bit" (Journalist 9), regarding news programmes, with channels repeating the same topics. He was not the only one: another interviewee also said that "there are some very good products, but there is room to innovate more" (Journalist 11), given that work is done on the basis of audiences, especially private channels. Another journalist made a stronger criticism: "we have a lot of bad television journalism" (Journalist

7), pointing to CMTV as the main culprit, including for the spread of bad journalism to other channels, stating: "CMTV has lowered the standards". CMTV is, after all, the ratings leader in Portugal ("CMTV Líder na Informação com Melhor Resultado de Sempre em 2022", 2023). "There is journalism that is very well done, but there are also poor approaches which shame journalism", Journalist 7 added. Another journalist (Journalist 4), from another channel, made the same criticism: "people strive very much for quality and do the best they can", she began, before criticising sensationalism: "everyone tries to see what CMTV is doing and then chases after that".

What about radio? Here too, the criticisms on the lack of innovation persist: "we lack diversity, we all do the same thing" (Journalist 5), identifying the same problem as two of the television journalists. Another journalist mentioned the lack of innovation in the field of storytelling, for example in audio reporting (Journalist 6). Two of the interviewees, however, stated that the quality is "except on rare occasions, very poor" (Journalist 1), partly due to the time constraints on the journalist's work. "There isn't as much time and resources available to do what could be really good", affirmed Journalist 8, although going on to say that in the newsroom where she works "accuracy isn't lacking". Even the journalist (Journalist 3) who stated that "yes, without a doubt", radio journalism in Portugal is of good quality, then added the reservation that newsrooms that have been depleted by redundancies and have fewer journalists than before have had the quality of their journalism affected. They mention that, nonetheless, people are hard-working and want to maintain quality despite the lack of staff.

The findings, aligning with a prior survey by Gómez Mompart et al. (2015), displayed a more positive outlook. For instance, only half of Gómez Mompart et al.'s surveyed journalists believed their media outlets provided sufficient relevant information. This variance might be attributed to the nuanced expression of opinions enabled by interviews, potentially leading to less critical perspectives than the survey results. Television journalists were also asked which television channel was their favourite. Three mentioned SIC, although only one interviewee belonged to SIC, one mentioned RTP and another said "none". The radio journalists were evenly split between their favourite radio station being Antena 1 or TSF.

Finally, the last question in the script asked the interviewees: "do you think you have the conditions necessary to practise journalism with the quality you would like to achieve?". The answers can be divided into those who said "yes" and those who said "no".

Faced with this question, six of the interviewees initially stated they had the necessary conditions to practise good journalism. When highlighting the positive points, two journalists (Journalist 7 and Journalist 2) mentioned that there is "no pressure or constraint" on their work. Only one emphasised his personal characteristics, such as good academic training (Journalist 3), training which, as was noted above, has become much more specialised for most members of the profession in this century. "I think I have the conditions needed, the freedom to do the pieces the way I want" (Journalist 11), stated one of the television journalists.

However, even among those who initially asserted that they had the essential conditions for their work, all but one had some reservations after the initial affirmation.

"Frustrating" wage stagnation (Journalist 2), limited budgets for reporting and small teams were highlighted. Therefore, although six of the interviewees initially stated they had the conditions necessary to practise the "good journalism" they would like, five of them pointed out that these conditions could be better — mainly due to the economic constraints within media companies, which limit the size of teams and investment in work, or due to their own working situation.

Five journalists answered "no" to the last question in this script, stating that they did not feel they have the necessary conditions to practise good quality journalism. Three of the interviewees once again mentioned unfavourable pay and working conditions. "There is a general limitation that affects your way of being, which is the salary situation," said one of the interviewees (Journalist 10). Another journalist (Journalist 4) stated that pay conditions in her newsroom had not been updated for four years. One journalist (Journalist 3) even spoke of an "incentive to leave" in his media outlet, leading many journalists to leave in the last eight years, which has discouraged and hindered the development of work.

Three journalists also spoke about the lack of human resources. One of the interviewees, a radio journalist (Journalist 6), mentioned the lack of journalists with whom to discuss ideas and brainstorm stories, as well as producers and technicians. Another interviewee (Journalist 8) stated that because there is "a lack of people in the newsroom to free up journalists for reporting", she did not have as much time to work on topics as she would like. A third went as far to say: "I wish my media outlet had more resources so I didn't have to do 17 different jobs" (Journalist 4).

As a result, of the 11 journalists interviewed, only one (Journalist 7) unreservedly claimed to have the conditions she would like in order to carry out quality journalism.

5. Conclusions

The results of these interviews provide a contribution to the study of the quality of journalism in Portugal, by focusing on journalists' perspectives concerning the essential characteristics of quality journalism, their assessment of the state of journalism in Portugal and the existing conditions for its practice. The perspectives represented are in line with the international studies presented in the literature review, from the Spanish journalists who responded to the survey by Gómez Mompart et al. (2015), who blame the lack of quality in journalism mostly on the lack of investment by news companies, which creates poor conditions for production, to what is generally reported from that survey to the interviews by Jenkins and Nielsen (2020) on the difficulty of producing quality content with the speed that is required and in the time that is provided to do so.

This indicates that there are cross-cutting international challenges regarding the quality of journalism, including the lack of investment or funding for newsrooms, the resulting reduction in human resources, and the lack of time to devote to journalistic work, which is partly the result of this loss of labour, and partly driven by competitive dynamics and the speed of the digital medium.

However, it is also important to emphasise that these problems are not just present-day ones. Let us consider the following reflection by Crespo, Azevedo, and Cardoso (2017) as an example:

> while in 2017 the conditions under which the profession is exercised are much questioned, it is important to realise how similar the issues raised by Paquete de Oliveira in 1994 are to this: "The conditions under which the profession is exercised are interdependent with those that mark the economic, political and social situation of press companies in particular and the press in general within the context of the country" (Oliveira, 1994, p. 82). (p. 51)

Although the interviewees are not unanimous in their assessment of the quality of television and radio journalism in Portugal (even the most positive ones had criticisms to make), most of the journalists interviewed considered that their working conditions for producing good journalism fall short of what is desired. The results suggest that journalists are able and willing to make negative assessments of their own work and to justify these assessments by stating the factors that cause the results to fall short of what is desired, which is promising for future research into the quality of journalism that seeks to focus on the perceptions of those who produce it. In this sense, this is a promising indication and one that does not follow the same line, for example, as that recorded in disinformation studies, where journalists state that the media in general are responsible for spreading disinformation (more than 60% consider that they have at least a moderate role in this process), but reject that the media outlet where they work has to be held accountable for this (Miranda et al., 2023).

A drawback of this study is that it was not possible to interview journalists from CMTV or Rádio Observador, media outlets that were mentioned several times by the interviewees as references (a negative reference in the case of CMTV), something that should be remedied in a future study.

The results of this study could inform future work on the subject of journalists' perceptions of the quality of journalism, for example through the survey method, in order to establish links between the concerns expressed and journalists' profiles, the media outlet they work for and their years of experience. It is also considered that it would be important to study the categorisations and classifications of journalism quality from the perspective of the audience in Portugal.

Translation: Linguaemundi Language Services, Lda.

Acknowledgements

This work was carried out with the support of the Fundação para a Ciência e Tecnologia (FCT), through doctoral scholarship UI/BD/152716/2022.

References

Almeida, R. (2023, February 8). O cão partilhado por Ventura e o tsunami que não aconteceu — As imagens falsas do sismo na Turquia. *Público*. https://www.publico.pt/2023/02/08/mundo/noticia/cao-partilhado-ventura-falso-tsunami-imagens-falsas-sismo-turquia-2038114

Cagé, J. (2016). *Salvar os média: Capitalismo, financiamento participativo e democracia* (1st ed.). Círculo de Leitores.

Camponez, C., Miranda, J., Fidalgo, J., Garcia, J.-L., Matos, J. N., Oliveira, M., Martins, P., & Alcântara da Silva, P. (2020). *Estudo sobre os efeitos do estado de emergência no jornalismo no contexto da pandemia Covid-19. Relatório*. Sopcom.

Cardoso, G., Crespo, M., Foá, C., Lapa, T., Quintanilha, T., Mendonça, S., Moreno, J., Neves, M., Paisana, M., & Vieira, J. (2015). *Modelos de negócio e comunicação social: "Telcos", legacy media, novos media e start-ups jornalísticas em navegação digital - estudo prospectivo*. CIES-IUL; Entidade Reguladora para a Comunicação Social; OberCom.

Cardoso, G., Paisana, M., & Pinto-Martinho, A. (2022). *Digital news report Portugal 2022*. OberCom.

CMTV líder na informação com melhor resultado de sempre em 2022. (2023, January 1). *Correio da Manhã*. https://www.cmjornal.pt/tv-media/detalhe/cmtv-lider-na-informacao-com-melhor-resultado-de-sempre-em-2022

Correia, F. (1997). *Os jornalistas e as notícias*. Caminho.

Correia, F., & Baptista, C. (2007). *Jornalistas do ofício à profissão: Mudanças no jornalismo português (1956-1968)*. Caminho.

Crespo, M., Azevedo, J., & Cardoso, G. (2017). Jornalismo em Portugal: O contributo de Paquete de Oliveira para a caracterização da profissão e o retrato dos jornalistas hoje. *Revista Comunicando*, *6*(1), 35–53.

Crespo, M., Azevedo, J., Sousa, J., Cardoso, G., & Paisana, M. (2017). *Jornalistas e condições laborais: Retrato de uma profissão em transformação*. OberCom.

Duarte, R. (2004). Entrevistas em pesquisas qualitativas. *Educar*, (24), 213–225. https://doi.org/10.1590/0104-4060.357

Esteves, A. T. (2020). *Relatório de regulação 2020: Análise económico-financeira do setor de media em Portugal*. ERC.

Garcia, J. L., & Oliveira, J. M. P. (1994). *Jornalista português: O que é? Inquérito e perfil socioprofissional*. Sindicato dos Jornalistas.

Gladney, G. A. (1996). How editors and readers rank and rate the importance of eighteen traditional standards of newspaper excellence. *Journalism & Mass Communications Quarterly*, *73*(2), 319–331.

Gómez Mompart, J. L., Gutiérrez Lozano, J. F., & Palau Sampio, D. (2015). La calidad periodística en España según la percepción de los periodistas. *Estudios Sobre el Mensaje Periodístico*, *21*(0), 13–30. https://doi.org/10.5209/rev_esmp.2015.v21.50647

Jenkins, J., & Nielsen, R. K. (2020). Proximity, public service, and popularity: A comparative study of how local journalists view quality news. *Journalism Studies*, *21*(2), 236–253. https://doi.org/10.1080/1461670X.2019.1636704

Lacy, S. (2000). Commitment of financial resources as a measure of quality. In R. G. Picard (Ed.), *Measuring media content, quality, and diversity: Approaches and issues in content research* (pp. 97–103). Media Economics, Content and Diversity Project; Media Group, Business Research and Development Centre.

Litman, B. R., & Bridges, J. (1986). An economic analysis of daily newspaper performance. *Newspaper Research Journal*, *7*(3), 9–26.

Lopes, F. (2015). *Jornalista: Profissão ameaçada*. Alêtheia Editores.

Lusa. (2021, May 3). *Mais de 100 jornalistas despedidos em Portugal desde início da pandemia revela sindicato*. RTP Notícias. https://www.rtp.pt/noticias/covid-19/mais-de-100-jornalistas-despedidos-em-portugal-desde-inicio-da-pandemia-revela-sindicato_n1317119

Martins, E., & Palacios, M. (2016). *Ferramentas para análise de qualidade no ciberjornalismo - Volume 2: Aplicações*. Editora LabCom.IFP.

McQuail, D., & Deuze, M. (2020). *McQuail's media & mass communication theory* (7th ed.). SAGE.

Meyer, P. (2009). *The vanishing newspaper: Saving journalism in the information age* (2nd ed.). University of Missouri Press.

Miranda, J. (2021). Reivindicações dos profissionais da informação. *Media & Jornalismo*, *21*(39), 15–35.

Miranda, J., Torre, L., & Jerónimo, P. (2023). *Desinformação, transparência, e confiança: Perceções das/dos jornalistas em Portugal*. Editora LabCom.

Morais, C. (2015, December 17). Portugal perdeu 1218 jornalistas em sete anos. *Diário de Notícias*. https://www.dn.pt/media/portugal-perdeu-1218-jornalistas-em-sete-anos-4941113.html

Odriozola-Chéné, J., & Rodrigo-Mendizábal, I. (2017). Hacia un periodismo de calidad en Ecuador: Perspectivas de periodistas y audiencia. *Cuadernos.info*, *41*, 175–192. https://doi.org/10.7764/cdi.41.1100

Palacios, M. (2011). *Ferramentas para análise de qualidade no ciberjornalismo - Volume 1: Modelos*. Livros LabCom.

Peters, B. (2010). The future of journalism and challenges for media development. *Journalism Practice*, *4*(3), 268–273. https://doi.org/10.1080/17512781003760535

Picard, R. G. (2000). Measuring quality by journalistic activity. In R. G. Picard (Ed.), *Measuring media content, quality, and diversity: Approaches and issues in content research* (pp. 97–103). Media Economics, Content and Diversity Project; Media Group, Business Research and Development Centre.

Plasser, F. (2005). From hard to soft news standards? How political journalists in different media systems evaluate the shifting quality of news. *Harvard International Journal of Press/Politics*, *10*(2), 47–68. https://doi.org/10.1177/1081180X05277746

Pordata. (n.d.). *Jornais e outras publicações periódicas: Total e por suporte de difusão*. Retrieved January 7, 2022, from https://www.pordata.pt/Portugal/Jornais+e+outras+publica%c3%a7%c3%b5es+peri%c3%b3dicas+total+e+por+suporte+de+difus%c3%a3o-2240

Rosenstiel, T., Just, M. R., Belt, T. L., Pertilla, A., Dean, W. C., & Chinni, D. (2007). *We interrupt this newscast: How to improve local news and win ratings, too*. Cambridge University Press.

Silva, E. C. e. (2020). *Jornalismo e democracia: Pistas para uma nova política de apoio do Estado à imprensa*. CECS.

Thiry-Cherques, H. R. (2009). Saturação em pesquisa qualitativa: Estimativa empírica de dimensionamento. *Revista Brasileira de Pesquisas em Marketing*, *9*(1), 20–27.

Williamson, K. (2018). Questionnaires, individual interviews and focus group interviews. In *Research methods: Information, systems, and contexts* (2nd ed., pp. 379–403). Elsevier. https://doi.org/10.1016/B978-0-08-102220-7.00016-9

Biographical Note

Marta Santos Silva was a journalist at *Diário de Notícias* and ECO, and is currently a PhD student at the University of Beira Interior, with a thesis dedicated to the intersections between the quality of journalism and business models.

ORCID: https://orcid.org/0009-0004-9148-3307

Email: marta.santos.silva@ubi.pt

Address: Universidade da Beira Interior, Rua Marquês D'Ávila e Bolama, 6201-001 Covilhã – Portugal

Submitted: 12/04/2023 | Accepted: 18/09/ 2023

Comunicação e Sociedade, vol. 44, 2023, e023021
https://doi.org/10.17231/comsoc.44(2023).4708

Transparency as a Quality Dimension: Media Ownership and the Challenges of (In)visibility

Alexandra Figueira
Departamento de Comunicação, Faculdade de Comunicação, Arquitetura, Artes e Tecnologias da Informação, Universidade Lusófona do Porto, Porto, Portugal
Conceptualization, data curation, formal analysis, investigation, methodology, writing – review & editing

Elsa Costa e Silva
Centro de Estudos de Comunicação e Sociedade, Instituto de Ciências Sociais, Universidade do Minho, Braga, Portugal
Conceptualization, data curation, methodology, validation, writing – original draft, writing – review & editing

Abstract

The principle of transparency is widely accepted as a political response to concerns about the lack of pluralism and trust in journalism. With a multidimensional character, transparency in ownership is one of the most common legal requirements. The focus on media "owners" is not new, given the impact that ownership can have on the content produced. Ownership is therefore considered essential when assessing quality in journalism. In Portugal, media ownership is subject to transparency rules, requiring disclosing information about the corporate structure and financial data overseen by the Portuguese Regulatory Authority for the Media. There is no investigation into how Portuguese media companies comply with these regulations. However, analysing it could help us understand the challenges facing independent and pluralistic journalism. Thus, this study examines how the principle of media transparency is perceived in the Portuguese market, analysing non-compliance and objections to disclosing the required information. Based on the regulatory decisions, this analysis highlights the central role of scale in adapting to the new legal framework: non-compliance with declarations or requests for secrecy emanates mainly from smaller companies, especially those owning local media or specialised magazines. Financial information is also the most critical. This data points to economic weaknesses, which may raise concerns about the media's independence from external agents. On the other hand, the principle of visibility and transparency has not significantly impacted discussions on ownership concentration or media pluralism, indicating its insufficiency as the primary policy on media ownership.

Keywords
ownership, regulation, capture, economic and financial sustainability, quality of journalism

A Transparência Como Dimensão da Qualidade: A Propriedade dos Média e os Desafios da (In)visibilidade

Resumo

O princípio da transparência tem sido considerado como uma resposta política consensual às preocupações com a falta de pluralismo e de confiança no jornalismo. De caráter multidimensional, a transparência relativa à propriedade é uma das exigências legais mais correntes. O foco nos "donos" dos média não é recente, dado o impacto que a propriedade pode ter nos conteúdos produzidos. A propriedade é, por isso, considerada essencial quando se avalia a qualidade no jornalismo. Em Portugal, a propriedade dos média é sujeita a regras de transparência, que implicam a divulgação de informação sobre a estrutura empresarial e dados financeiros, cabendo à Entidade Reguladora para a Comunicação Social monitorar o seu cumprimento. O modo como as empresas de média em Portugal têm respondido às novas exigências legais não tem sido investigado, apesar de essa análise poder contribuir para se compreender os desafios que se levantam ao exercício de um jornalismo independente e plural. O objetivo deste estudo é assim perceber de que modo o princípio da transparência dos média tem sido recebido pelo mercado em Portugal, averiguando os incumprimentos e as objeções levantadas à divulgação da informação requerida. Esta análise, realizada a partir das deliberações da Entidade Reguladora para a Comunicação Social, evidencia o papel central da escala na adequação ao novo enquadramento legal: os incumprimentos declarativos ou pedidos de sigilo partem sobretudo das empresas de menor dimensão, detentoras de média locais ou de revistas especializadas. Ainda, a informação de caráter financeiro é a mais crítica. Estes dados apontam para fragilidades a nível financeiro, o que pode levantar dúvidas relativamente à independência dos média face a agentes externos. Por outro lado, o princípio da visibilidade da transparência não contribuiu para a discussão sobre o cenário mediático em matéria de concentração da propriedade ou de pluralismo, o que demonstra a insuficiência deste princípio como principal política relativa à propriedade dos média.

Palavras-chave
propriedade, regulação, captura, sustentabilidade económico-financeira, qualidade do jornalismo

1. Introduction

Transparency in media regulation has become unavoidable. Increasingly presented as an essential requirement for the free and democratic operation of societies, promoting transparency is widely accepted as a unanimous approach to addressing concerns about the lack of media pluralism and fostering trust in journalism. As a principle consolidated in ownership regulation through multiple instruments, it goes beyond this single material dimension: it is also a way of combating the erosion of public trust in journalism and news media (Karlsson, 2020).

Transparency, often linked with journalism quality (Lacy & Rosenstiel, 2015), serves as a tool for accountability and enhancing credibility with the public. This is achieved by providing visibility into journalistic production methods (Kovach & Rosenstiel, 2001) and disclosing the relationships that impact its functioning, crucial given that the media is a cornerstone of the public sphere (Allen, 2008). A well-informed citizenry relies on access to credible and verified information people can trust for decision-making (Strömbäck, 2005). Craft and Heim (2009) emphasise that the public needs "a certain kind and quality of information to aid in self-governance and community sustenance and journalism's unique qualifications for providing that information" (p. 217). There is substantial evidence supporting the vital role of news media in empowering citizens (Aalberg & Curran, 2012) and their instrumental role in enhancing accountability across various sectors of power (Lindgren et al., 2019; Schudson, 2008).

However, the media could also be subject to instrumentalisation. By often echoing the *status quo*, they tend to uphold established and powerful players, thereby serving as a tool for legitimising prevailing power structures and social hierarchy (Hall et al., 2017). In addition to the media's propensity to reproduce the elites' version, we must also consider the hypothesis of their "capture" by other established powers, such as the government and political agents or property owners (Cage et al., 2017; Dragomir, 2019). Therefore, the exercise and production of high-quality journalism must regularly undergo consistent accountability mechanisms and scrutiny to ensure its effective contribution to democracy, as this function is not a self-fulfilling prophecy (Trappel & Tomaz, 2021).

Ownership and transparency are essential in this context. This perspective has been acknowledged by institutions such as the European Union and the Council of Europe, expressed in various published documents (including deliberations, directives and recommendations). Although it is not the only condition, it stands as an essential requirement if the media are not to be diverted from their fundamental mission. Given their associations with political and economic influence in news production and funding, the media can be held hostage by political and economic interests. Hence, the principle of advocating for transparency is based on the premise that public access to information about media ownership and journalism funding is fundamentally essential.

In Portugal, Law 78/2015 (Lei n.º 78/2015, 2015) mandates transparency in media ownership, management, and financing, overseen by the Portuguese Regulatory Authority for the Media (ERC). However, the comprehensive implications of the law's implementation have yet to be systematically scrutinised. What changes and responses has the enactment of this law prompted, both among regulated entities (market players) and the regulatory body? While transparency has not been questioned from a political point of view, it is to be expected that compliance may be contested from the point of view of economic agents. Full disclosure of information can jeopardise companies' competitive advantage (De Laat, 2018) or conflict with the interests of owners and shareholders (Henriques, 2013). Therefore, on the one hand, it is essential to explore how the principle of media transparency has been received by market players in Portugal, analysing instances of non-compliance and objections raised by owners regarding the required information disclosure. Equally important is examining the regulatory body's adherence to the new law's provisions. Drawing from the cases assessed by ERC since the law's inception until February 2023, this analysis can shed light on the challenges this dimension poses to the practice of journalism in conditions of independence and autonomy, integral to ensuring its quality.

2. Transparency in the Media

Before becoming prevalent in the world of media, the idea of transparency was already consolidated in various sectors, from finance to monetary policies, and had particular significance in anti-corruption strategies as a means to enhance oversight of governmental processes and public money (Craft & Heim, 2009). Although there is no unanimity in its conceptualisation, various definitions have pointed to notions of visibility, openness and accountability, emphasising the social benefits of such exposure (Karlsson, 2010; Singer, 2006). For example, Holtz and Havens (2009) define transparency as "the degree to which an organisation shares information its stakeholders need to make informed decisions" (p. 2).

Within the media field, journalism's social function is closely tied to the concept of transparency, appreciated for its contribution to establishing and upholding credibility (Craft & Heim, 2009). A more transparent form of journalism — one that explains how the agenda is constructed and the relationship with information sources and openly discloses its financing — is an institution that establishes a relationship of trust with the public. Consequently, transparency is crucial in the ongoing public debate on media responsibilities (Miranda & Camponez, 2022). Transparency can catalyse a renewed professional approach, nurturing a stronger relationship between journalists and their audiences. Transparency in journalistic production can aid in rebuilding any potentially strained relationship with news consumers (Bock & Lazard, 2021; Heim & Craft, 2020). Furthermore, making ownership visible can enhance the autonomy and credibility of journalism (Cappello, 2021).

Transparency is thus a complex and multidimensional concept, which can impact media production conditions such as ownership (Craufurd Smith et al., 2021), journalistic media production (Miranda & Camponez, 2022) and media distribution through algorithmic platforms (Diakopoulos & Koliska, 2017). It is also a principle and a challenge, given the numerous obstacles to its actualisation: intricate ownership mechanisms aggravated by the global movement of financial flows, the inefficiencies and resistance within journalistic institutions or the algorithmic platformisation of society and cultural production (Poell et al., 2022).

Within this broad context of media transparency, ownership regulation holds significant importance. Policies to foster transparency, such as mandating the disclosure of beneficial owners nominally, are based on the assumption that owners can influence the content, professional autonomy and free flow of information (Sjøvaag & Ohlsson, 2019). Such regulations can also address concerns about concentration, commercialisation (profit orientation) and patronage. These phenomena can influence the quality of the journalism produced, thus justifying policies that regulate ownership, particularly regarding transparency. The underlying principle is that "transparency does not restrict ownership, but makes it visible so that the public can make informed choices about how to respond to the content provided" (Picard & Pickard, 2017, p. 29).

There is a growing emphasis on ownership transparency at the European level, which has dictated the emergence of policies at this level. The Council of Europe (2018) has recommended the development of laws that mandate transparency in media ownership for the benefit of pluralism. According to the recommendation, such measures could shed light on cross-ownership, direct and indirect ownership, effective control, and influence. Simultaneously, they aim to ensure an effective and manifest separation between the exercise of authority or political influence over content. Besides soft policy actions (non-binding regulatory strategies based on recommendations, guidelines, resource sharing, etc.), such as commissioning studies on transparency in the European media, the European Commission has also made progress in the legislative field. The revision of the Audiovisual Services directive in 2018 explicitly addresses the principle of ownership transparency. Recently, the European Commission has proposed the European Media Freedom Act, seeking to enforce mandatory disclosure of ownership data and introduce new requirements for allocating State advertising. These new provisions still await approval by the European Parliament and the member States. Moreover, they might undergo profound changes, particularly in light of the recent ruling by the European Court of Justice of the European Union on the disclosure of effective beneficiaries.

On November 22, 2022, a Court ruling invalidated a provision of the 5th Directive on the prevention and penalisation of money laundering in the European Union, that guaranteed public access to information on company owners. The case was referred by a Luxembourg court due to a challenge by that country's commercial registry, contending that the provision jeopardised the right to privacy. Following this decision, many public databases on owner registration were temporarily suspended. The decision was poorly received by several anti-corruption activists and others, even though the court acknowledged civil society's and the media's legitimate interest in accessing this information, particularly in the fight against money laundering. A proposal to amend the directive is now deemed necessary to reconcile the conflicting rights and to make such access operational.

When considering the anti-money laundering directive within the framework of media systems, it highlights a prevailing market reality: the emergence of players such as financial funds and private equity firms with no transparency obligations towards their shareholders or business people linked to autocratic regimes (Dragomir, 2019; Noam, 2018). In Portugal, for example, capital from countries that do not guarantee democratic principles in media companies has already raised concerns (Figueiras & Ribeiro, 2013; Silva, 2014).

The underlying assumption is that excessive media concentration or potential conflicts of interest on the part of owners can only be identified if there is visibility at the ownership level. Transparency is thus an instrument for guaranteeing diversity, as it highlights the different structures behind media services (Cole & Zeitzmann, 2021), clarifying whether citizens receive a spectrum of content offering diverse opinions and viewpoints. In instances where control is lacking or minimal, it becomes more challenging to detect biases or omissions, which can lead to a lack of trust in the media. Research has established a positive association between transparency and trust (Curry & Stroud, 2021). From a market perspective, transparency also offers benefits, contributing to open and fair competition. This principle can safeguard independence, enhancing the quality of media offerings (Cole & Zeitzmann, 2021).

Transparency can be observed in two distinct dimensions: one of an administrative and legal nature and the other of a civic nature (Craufurd Smith et al., 2021). While the civic dimension makes the media accountable to civil society, investors and the general public, the administrative dimension involves companies being open to auditing and monitoring by regulatory bodies and other public agents. Although transparency may not be a pressing concern for audiences and the public under typical media operating conditions (Karlsson & Clerwall, 2019), the second dimension of transparency is expected to yield benefits since regulatory agents and/or the State are, from the outset, more aware of the issues surrounding the performance and management of the media.

Thus, transparency policies cannot be used as a pretext to circumvent other public and regulatory policies in the media sector (Meier & Trappel, 2022). On the contrary, transparency should be the mechanism that delineates where and how the State should intervene. These authors caution that transparency alone does not guarantee market competition or media pluralism. In the same vein, Craufurd Smith et al. (2021) argue that while transparency is necessary, it is insufficient. This principle "can only ever be the starting point – and not the goal – in politics defending the normative ideals of news media in liberal democracies" (Meier & Trappel, 2022, p. 270).

Attaining sufficient levels of transparency can be challenging, primarily due to the difficulty in measuring adequacy in this domain and because the realisation of what it means often remains unachieved. While not questioning the normative value of transparency, its practical implementation in the media industry remains ambiguous. Although the ethical significance of transparency is sustained in the public agenda, the complexity of its implementation and practice must be acknowledged and examined (Bock & Lazard, 2021), as well as the limitations in fully accomplishing the ideal of transparency (Ananny & Crawford, 2018).

It is, therefore, pertinent to investigate how companies operating within the media sector have responded to the new legal framework. Such an analysis can shed light on the actual landscape of its implementation, providing insights into the perceptions and practices of the agents.

3. Promoting Ownership Transparency — The Portuguese Case

On media transparency policies, Portugal stands ahead of most European countries, which have no specific requirements (Craufurd Smith et al., 2021). Several revisions to the media sector laws (including press, radio and television laws) have been introduced to enforce the public disclosure of the nominative composition of capital holders. According to Rabaça (2002), "the principle of transparency is currently among the most effective methods for safeguarding pluralism and preventing concentrations" (p. 419), and this is increasingly becoming the fundamental legal instrument. Meanwhile, since 2015, legislation has specifically addressed transparency obligations at the ownership level: Law No. 78/2015 (Lei n.º 78/2015, 2015), which mandates transparency in media ownership, management and financing. According to this legal provision, ERC must manage a Transparency Portal where citizens can access the list of beneficiaries associated with companies operating in the sector.

The law encompasses, as per Article 6 of ERC statutes (Lei n.º 53/2005, 2005), news agencies, editors of periodicals, radio and television operators, including digital media, and any other entities consistently presenting content subject to editorial treatment and organised as a coherent unit accessible to the public through electronic communications networks. Following the transposition of the Audiovisual Services Directive in 2020, reporting obligations have also extended to on-demand audiovisual service providers. Companies are required to report the shareholders and the chain of ownership of "qualifying holdings" (equal to or greater than 5%), as well as any increase or decrease in the percentage of holdings. The reporting requirements also include details about the composition of the governing bodies and publishing authorities, financial data, and identification of relevant clients and liability holders. Companies can also request confidentiality for the disclosed data, subject to ERC authorisation.

After the law was enacted (Lei n.º 78/2015, 2015) in 2015, ERC launched a platform in April 2016 for companies to comply with the submission of the required information. Over the subsequent three years, the regulatory body and the regulated collaborated to assess and rectify the reporting methods, gradually refining the procedures while considering guidelines on safeguarding personal data (Entidade Reguladora para a Comunicação Social, 2020). In December 2019, the Transparency Portal was finally launched, handling the information provided by companies and making it accessible to the public. A few months earlier, ERC had begun reviewing the confidentiality requests it had received in the interim. Only then (in October 2019) guidelines were established to ensure a consistent understanding within the entity. Requests primarily focused on the sensitivity of the data, as applicants "anticipated potential adverse impacts resulting from the disclosure of information related to the media's business strategies, revenue structures and the economic and financial sustainability" (Entidade Reguladora para a Comunicação Social, 2020, p. 264).

Beyond the information available through the Transparency Portal, the regulatory reports, issued since 2016, include processed and aggregated information from the companies and organisations registered on the portal. For instance, as of June 20, 2022, 1,848 agencies owned by 1,463 entities were registered, of which 60% primarily engaged in media-related activities (Entidade Reguladora para a Comunicação Social, 2022). These reports also categorise data by industry sector, such as food or religion, shedding light on some ownership structures linked with the respective entities. However, despite public adherence to these directives, the anticipated added value from the principle of transparency remains elusive. As noted by Baptista (2022), "public discussion is limited and fails to contribute to a thorough understanding of the interactions between the media system and political and economic powers" (p. 147).

This situation demands a comprehensive mapping of the reactions following the enactment of the law, both from the regulatory body (responsible for ensuring compliance with legal provisions) and the regulated entities (subject to these obligations). Despite acknowledging critical viewpoints on transparency — not expecting the pursuit of this principle to be a panacea for all the problems or risks affecting the media — it remains essential to assess the outcomes of the law's implementation.

4. Methodology

This research seeks to understand how the regulated entities (media companies) have complied with legal guidelines (and, above all, what objections they have raised) and how the regulatory body has responded. A document analysis of ERC's deliberations was conducted to meet the purpose of the research, as these documents encapsulate the core of regulatory activity and the outcomes of the entity's responses to the behaviour of the regulated entities. A categorical content analysis was performed on the entire *corpus* of documents extracted from ERC's website in February 2023 using the keyword "transparency".

This search produced 99 results. An initial temporal analysis of the deliberations showed that 16 of these documents related to a period before the law was enacted and were therefore excluded. This led to 83 deliberations, out of which 14 were also excluded as they did not relate to the "Transparency Law" of media ownership. From the remaining 69, one concerned a complaint by Impresa about a news item in a media outlet belonging to the Newsplex group, resulting in a parallel process; another concerned the closure of an administrative offence; and three concerned clarifications of the law itself. That left 64 decisions, primarily falling into two situations: (a) requests for confidentiality in disclosing mandatory reporting data by media companies and (b) proceedings opened by ERC concerning non-compliance with reporting obligations.

Consequently, the research focused on an analysis of these 64 decisions. Their initial reading unveiled the following constituent elements, which were transformed into categories for analysis: "date", "company identification", and "ERC decision", further divided into the subcategories related to "mandatory reporting data" or "requests for secrecy". In order to understand the nature of the companies involved, two other categories were added ("type of media" and "geographical scope") for which data was collected through an online search of public information.

After the documents were classified, the analysis involved tallying the number of non-compliances within each category (refer to Table 1) and subcategory (refer to Appendix 1 and Table A1), followed by a descriptive statistic analysis. All the regulatory body's decisions were considered in this count, including those relating to companies in the same economic group and those targeting the same company twice. Additionally, all occurrences were documented, considering that a company might fail to meet more than one reporting obligation or request confidentiality for more than one type of information. It should be noted that ERC did not publish an evaluation form for only two companies, making it impossible to itemise the type of mandatory information missing.

Categorisation of reporting obligations
General identification data
Composition of governing bodies
Identification of share capital structure/shareholdings
Media organisations owned — identification
Financial characterisation
Complete corporate governance report

Table 1. *Global categorisation of media reporting obligations*

Note. Information from the deliberations of Portuguese Regulatory Authority for the Media analysed, Law 78/2015 (Lei n.º 78/2015, 2015) and Regulation 835/2020 (Regulamento 835/2020, 2020)

In addressing the omission of mandatory reporting data, ERC classifies the degree of compliance as binary: "present" or "absent", with two exceptions classified as "to be determined". For the scope of this investigation, it was considered that, in these cases, the duty to provide information had not been fulfilled. As for requests for secrecy, the regulatory authority only reports a decision to decline or partially grant the request (no request was fully granted).

5. Presentation of Results

Thus, the collection yielded 64 decisions involving 59 media companies since three companies were notified twice, and there were two cases of companies belonging to the same business group. These companies are only mentioned in the context of the opening of proceedings for non-compliance with reporting obligations. There are no overlaps between the companies notified of non-compliance with reporting obligations and those that have requested the secrecy of mandatory reporting information.

As a result, 48 administrative and/or administrative offence proceedings were opened against 43 companies or business groups for non-compliance with reporting obligations and 16 decisions were issued on requests for confidentiality. In the first year of operation, ERC's website does not list any deliberations on requests for secrecy; the following year, however, saw the highest number of deliberations: 66% of the total (Table 2).

Date of deliberation	Opening of proceedings	Requests for secrecy	Total
2023 (to January)	1	2	3
2022	5	14	19
2021	42	0	42
Total	48	16	64

Table 2. *Date of Portuguese Regulatory Authority for the Media deliberations*

Note. Information from the deliberations of Portuguese Regulatory Authority for the Media analysed

The characterisation of the involved companies highlights two realities: periodicals accounted for 52% of the instances related to non-compliance with reporting obligations, whereas radio stations were notably prominent in requests for secrecy (Table 3). When combining these two categories, the two typologies demonstrate a balanced representation.

Media type	Opening of proceedings	Requests for secrecy	Total
Periodical publication	25	4	29
Radio	19	11	30
Television	4	1	5
Total	48	16	64

Table 3. *Breakdown of the companies involved by publication type*

Note. Information from the deliberations of Portuguese Regulatory Authority for the Media analysed

Most of the media involved are locally oriented, constituting 72% of the total (comprising 28 radio stations and 15 newspapers). The remaining 28% operate nationally, particularly within specialised magazine sectors (22% of the overall figure): real estate, tourism, motoring, travel, architecture, economics and religion, among others (Table 4). These specialised magazines are represented by only 12 companies, encompassing 27 periodicals. Regarding audiovisual media, there are three local television news channels and two cable channels (catering to culture and adult segments). Among national titles, only Newsplex, owner of the general information newspapers *Inevitável* and *Pôr do Sol*, was notified due to deficiencies in identifying the share capital structure, media outlets owned, financial characterisation and corporate governance data.

Geographical distribution of the involved media	Opening of proceedings	Requests for secrecy	Total
Local	30	15	45
Local/specialised	1	0	1
Subtotal	31	15	46
National	4	0	4
National/specialised	13	1	14
Subtotal	17	1	18
Total	48	16	64

Table 4. *Geographical distribution of the involved media*

Note. Information from the deliberations of Portuguese Regulatory Authority for the Media analysed

5.1. Opening of Proceedings for Non-Compliance With Reporting Obligations

As noted earlier, out of the 64 reviewed decisions, 48 aimed to open proceedings regarding non-compliance with reporting obligations: 47 administrative offence proceedings (42 of which were suspended for 10 days to allow the regulated entities to provide the lacking information, resulting in case closure, while five were enforced) and one administrative offence proceeding was closed due to the defendant's insolvency. The number of non-compliances registered, even after the adjustment period granted by the regulatory authority, indicates certain challenges in the coordination between ERC and the regulated entities.

The stipulated legislation requires the publication of 51 pieces of information, categorised into six areas: general data identifying the company and its representative; composition of the governing bodies; identification of the structure of the share capital/shareholdings; identification of the media outlets owned and those accountable for publishing; financial characterisation of the company (means of financing); and a comprehensive corporate governance report (see Appendix). Table 5 shows the subcategories marked in each resolution (a company may be represented in more than one category). Financial information stands out as the category with the highest number of non-compliances, significantly behind identifying the composition of companies' share capital structure.

Type of non-compliance	Number of companies
General identification data	7
Composition of governing bodies	31
Identification of share capital structure/shareholdings	41
Media organisations owned — identification	12
Financial characterisation (means of financing)	118
Complete corporate governance report	43
Total	252

Table 5. *Classification of non-compliance with declarations*

Note. Information from the deliberations of Portuguese Regulatory Authority for the Media analysed

In the published resolutions, ERC has detailed all categories except the "corporate governance report", which may be under-represented. In the "financial characterisation" category, the regulatory authority specifies only three subcategories ("financial flows", "relevant clients", and "holders of relevant liabilities") out of a total of 12 mandated by the legislation. This study recorded all the occurrences, acknowledging that a company may fail to comply with multiple reporting obligations.

Finally, ERC breaks down the categories "financial characterisation" (and its subcategories) and "corporate governance report" by year. Commencing from 2017, set as the initial year for annual reporting by the regulatory authority, there is a gradual increase in non-compliance count, peaking in 2019. As for 2020 and 2021, the numbers are negligible.

One open case was closed due to the defendant's insolvency. No available information in the database indicates whether the remaining regulated organisations rectified their non-disclosure within the 10-day deadline or if ERC could pursue the administrative offence further. The data shows that information on financial flows, relevant customers and relevant liability holders is regarded as particularly sensitive (Table 6).

Type of relevant non-compliance per year	2017	2018	2019	2020	2021	Total
i. Financial flows	27	33	41	1	2	104
ii. Relevant clients	23	29	37	0	1	90
iii. Holders of relevant liabilities	22	28	36	0	1	87
iv. Profit-and-loss statement and balance sheet	0	0	0	1	1	2
Corporate governance report	30	35	42	3	3	113
Total	102	125	156	5	8	396

Table 6. *Type of non-compliance relating to financial characterisation per year*

Note. Information from the deliberations of Portuguese Regulatory Authority for the Media analysed

Comparing the media type and geographic distribution with the omitted information reveals that local media are the most frequent non-compliers. The same pattern is evident among periodicals (Table 7).

	Geographical distribution				Media type		
Type of non-compliance	National	National/ specialised	Local	Local/ specialised	Periodical publication	Radio	Television
Identification data	0	3	4	0	6	1	0
Composition of governing bodies	2	13	16	0	19	10	2
Share capital structure	4	15	22	0	31	10	0
Media organisations owned	1	7	4	0	11	1	0
Financial characterisation	6	34	72	3	63	46	9
Corporate governance report	3	13	26	1	24	15	4
Total	16	85	144	4	154	83	15

Table 7. *Non-compliance by type of media and geographical distribution*

Note. Information from the deliberations of Portuguese Regulatory Authority for the Media analysed

5.2. Request for Confidentiality of Information

Still on transparency, 16 companies requested the confidentiality of 46 mandatory items in the period under review. Notably, as shown in Table 7, relevant clients (11), holders of relevant liabilities (10), and overall financial flows (seven) were the most frequently requested information subcategories. It is worth noting that this aligns with the most frequent type of undisclosed information (see Table 4 and Table 5).

Besides the type of information requested to be kept confidential, ERC only discloses the identity of the requesting company: 10 local radio stations, four local newspapers, one local television station and one national and specialised magazine. Based on this information, shown in Table 8, it is possible to conclude that local companies account for 96% of the confidentiality requests (in line with the methodology applied in the segment on reporting obligations, all occurrences are noted, as a company can request the confidentiality of several types of information). A national specialised media outlet submitted the remaining two requests. There were no requests from national generalist media or local specialised media. Furthermore, radio stations are responsible for the largest count of requests to withhold information.

	Geographical distribution					Media type			
Data for which confidentiality has been requested	Nacional	National/ specialised	Local	Local/ specialised	Total	Periodical publication	Radio	Television	Total
Relevant clients	0	1	10	0	11	2	9	0	11
Holders of relevant liabilities	0	0	10	0	10	1	9	0	10
Financial flows	0	0	7	0	7	0	6	1	7
Amounts of assets and total income	0	0	4	0	4	0	4	0	4
Amounts of liabilities and total liabilities on the balance sheet	0	0	4	0	4	0	4	0	4
Operating profit and net profit	0	0	4	0	4	0	4	0	4
Elements referred to in a generic, non-individualised way	0	0	1	0	1	0	1	0	1
Overall data provided	0	0	1	0	1	1	0	0	1
Ownership	0	1	0	0	1	1	0	0	1
Financial characterisation	0	0	1	0	1	0	1	0	1
Percentage of total income accounted for by relevant clients	0	0	2	0	2	2	0	0	2
Total	0	2	44	0	46	7	38	1	46

Table 8. *Confidentiality requests by type of media and geographical distribution*

Note. Information from the deliberations of Portuguese Regulatory Authority for the Media analysed

In its decisions on requests to withhold information, ERC refrains from sharing the grounds offered by the applicants, citing its intention to respect the confidentiality requested. For the same reason, it does not disclose the rationale behind the decision, indicating only the decision to reject or partially approve the request (in only one case, involving the Universal Church of the Kingdom of God, the owner of Global Difusion, operating six radio stations the request was partially granted, without specifying the identification of associates who do not represent a qualified holding). Furthermore, no provisional measures were enacted.

6. Discussion and Conclusion

Independence is a pivotal principle in upholding journalistic quality, and ownership transparency and the financial mechanisms related to the organisations' activities are possible pathways to ensure this principle. Transparency also makes it possible to examine the landscape of pluralism and diversity within the media sector. However, transparency might conflict with other values, including owners' privacy or companies' competitive advantages. This dynamic puts the quality of journalism at risk, as ownership is also the basis for assessing the conditions under which journalistic content is produced. Therefore, assessing the implications of the "Transparency Law", based on the reaction of economic agents to the new legal framework and the actions of the regulatory authority, provides a deeper understanding of the enforcement of this new tool.

An initial data review shows that most media outlets registered with ERC have generally adhered to the legal requirements, with the regulatory body needing to intervene in only a limited number of cases compared to the overall media landscape. However, analysing the interactions between the regulatory authority and the companies highlights other noteworthy patterns that warrant further exploration. Firstly, we should note the absence of deliberations involving major business groups responsible for the country's main media outlets. There seem to have been no difficulties for these major operators in complying with the legal precepts on transparency. That may suggest, contrary to concerns about potential harm to companies' competitive advantage (De Laat, 2018) or clashes with the interests of owners and shareholders (Henriques, 2013), that these major operators either welcomed the new transparency guidelines without seeing them as problematic or did not foresee any negative public reaction to the disclosed data.

Of course, three major media groups in Portugal (Impresa, Media Capital and Cofina) are publicly listed, which already entails significant reporting obligations. Nevertheless, despite ERC's publication of an annual report and consolidated data on media ownership in Portugal, there has yet to be any debate, action or official stance by public authorities, notably the Government. It should be noted that, while processing data on the nationality of media ownership, ERC has demonstrated the existence of capital from countries with autocratic regimes in various media (Entidade Reguladora para a Comunicação Social, 2022), including Angola and China, a situation that has already been analysed in scientific works (Figueiras & Ribeiro, 2013; Silva, 2014), yet the State has expressed no public concerns. Furthermore, the fact that 40% of the companies operating in the sector do not primarily focus on media activities and the potential implications regarding conflicts of interest (see, for example, Noam, 2018) have not been publicly addressed.

ERC has effectively collected the information required by law, taking action against non-compliant companies and making the data accessible on the portal. However, fostering transparency is not an end in itself. Law 78/2015 (Lei n.º 78/2015, 2015) explicitly highlights this in Number 1 of Article 1, stating that the regulation of property at this level is "aimed at promoting freedom and pluralism of expression and safeguard its editorial independence from political and economic powers", an objective that ERC meets according to its statutes. In other words, one would expect that increased visibility into companies' ownership and financial mechanisms would stimulate reflection on the risks inherent in the Portuguese media landscape.

However, the fact that ERC publishes data on the Transparency Portal and extracts information annually for its reports has not signalled any significant change in the media ownership landscape in Portugal: there have been no public statements suggesting that the "Transparency Law" has influenced the level of ownership concentration, nor has it been cited as a factor requiring action to enhance pluralism and diversity. Consequently, ERC has not issued any deliberation or recommendation (which, it should be remembered, has the legal powers to do so) resulting from the "Transparency Law", addressing media companies' ownership of capital (nationality or main sector of activity) or entities with financial clout. Nor has the Government, political parties or other civil society organisations taken any position on which ERC should have commented. The lack of action in this direction leads to the conclusion that the law is fairly ineffective in promoting public engagement in discussing the risks associated with media ownership in Portugal.

For instance, the results show that breaches adhering to reporting requirements and requests for confidentiality affect mainly small markets in local segments (therefore geographically limited) or niche specialised magazines. This conclusion raises a question: should distinct market realities, such as those in media markets, be treated similarly, especially when the industry is significantly influenced by scale (Noam, 2014; Picard, 2005)? On the one hand, it prompts the need to determine whether the regulatory demands are sufficient for larger, well-resourced companies with technical capacity (particularly accounting); on the other hand, it is necessary to investigate the potential challenges for smaller entities with limited technical capabilities to fulfil accounting and financial obligations. This study highlights the difficulty in achieving an "ideal of transparency" (Ananny & Crawford, 2018) because, as the scale is an important variable, doubts arise regarding whether a singular transparency standard can equitably serve all market players.

The issue of confidentiality, requested by some companies, is also noteworthy, especially when considering which data is requested the most: liability holders and relevant clients. Additionally, one of the primary sources of non-compliance revolves around disclosing the companies' means of financing. Thus, the problem may lie not with media owners and their right to privacy but with external agents that could compromise media independence. Hence, it is vital to assess whether these breaches and requests are linked to economic and financial fragility cases and whether they could lead to situations of media capture[1] (Dragomir, 2019; Meier & Trappel, 2022) by political and economic agents. This concern is particularly relevant when discussing the quality of journalism, as it involves a very relevant and particularly fragile type of journalism: local journalism (Jenkins & Jerónimo, 2021). However, ERC does not disclose the reasons invoked in the confidentiality requests submitted, preventing external scrutiny, nor has it promoted a public discussion on this topic.

This study underscores, as several authors have previously highlighted that transparency alone does not deliver the expected outcomes: it is necessary yet insufficient (Craufurd Smith et al., 2021; Meier & Trappel, 2022). By examining the data, it becomes evident that a role remains for regulation and public policies in an era of transparency. For instance, there is a crucial need to explore the influence of ownership on the media, particularly concerning situations of foreign capital from autocratic countries or other economic sectors. Simultaneously, the precarious state of local media should draw the

[1] "Media capture" is a concept that refers to situations in which political power or other interests interconnected with political power condition or control the actions of the media (Schiffrin, 2018).

attention of regulators and public decision-makers: a more comprehensive analysis of confidentiality requests could unveil the actual risk of media capture and suggest potential strategies for fortifying and upholding media independence.

Conversely, ownership transparency alone does not address the appropriateness or credentials of ownership, nor has this aspect been a subject of discussions within ERC. Thus, visibility cannot guarantee the suitability of the conditions for producing quality journalism. In other words, the administrative and legal dimensions of transparency are met in their structure. However, there is a lack of broad reflection on transforming it into a tool serving public communication policies that foster, for instance, independence and diversity in journalism.

Another issue relates to the scope of the law: it solely applies to companies involved in content production and organisation, overlooking the potential risks in distribution, whether it is still analogue or digital (Russell, 2019). This gap could become increasingly critical, particularly with the algorithm-based nature of the main news consumption platforms, potentially leading to biased access to information. Furthermore, these legal limitations might elude situations that compromise market competition, especially as production agreements with distribution (whether digital intermediaries or physical networks) may not be scrutinised. Transparency in terms of ownership of production does not solve the need for transparency in terms of distribution.

Finally, it is important to acknowledge that this study, focusing solely on the interaction between companies and the regulatory authority, does not encompass all the dimensions of the companies' actions regarding ownership transparency. Another limitation of this work, when considering the relationship between transparency and the quality of journalism, is that some companies considered in this mapping may not be solely journalistic: they are media companies, but, for example, some radio stations may be classified as music radios. However, it should be noted that this classification does not prevent the broadcasters from including local information; it just does not require a periodicity in terms of news broadcasts. Despite these limitations, the study of ERC's decisions provides relevant insights into the relationship between companies and ownership transparency, particularly because it highlights the invisibility of the legal framework and the state. Compliance with the principle of transparency might have obscured the need for active policies to promote quality in journalism by strengthening the conditions for its production.

Translation: Anabela Delgado

Acknowledgements

This work is supported by national funds through FCT – Fundação para a Ciência e Tecnologia, I.P., under the project UIDB/00736/2020 (base funding) and UIDP/00736/2020 (programme funding).

References

Aalberg, T., & Curran, J. (2012). *How media inform democracy*. Routledge.

Allen, D. S. (2008). The trouble with transparency: The challenge of doing journalism ethics in a surveillance society. *Journalism Studies*, *9*(3), 323–340. https://doi.org/10.1080/14616700801997224

Ananny, M., & Crawford, K. (2018). Seeing without knowing: Limitations of the transparency ideal and its application to algorithmic accountability. *New Media & Society*, *20*(3), 973–989.

Baptista, C. (2022). Transparency in Portuguese media. *Observatorio (OBS*)*, *16*(2), 138–149.

Bock, M. A., & Lazard, A. (2021). Narrative transparency and credibility: First–person process statements in video news. *Convergence*, *28*(3), 888–904. https://doi.org/10.1177/13548565211027813

Cage J., Godechot O., Fize E., & Porras, M. C. (2017). *Who owns the media? The Media Independence project*. Laboratoire Interdisciplinaire d'évaluation des Politiques Publiques.

Cappello, M. (Ed.). (2021). *Transparency of media ownership*. European Audiovisual Observatory.

Cole, M. & Zeitzmann, S. (2021). Conclusions. In M. Cappello (Ed.), *Transparency of media ownership* (pp. 115–118). European Audiovisual Observatory.

Council of Europe. (2018, March 7). *Recommendation CM/Rec(2018)1[1] of the Committee of Ministers to member States on media pluralism and transparency of media ownership*. https://search.coe.int/cm/Pages/result_details.aspx?ObjectId=0900001680790e13

Craft, S., & Heim, K. (2009). Transparency in journalism: Meanings, merits, and risks. In L. Wilkins & C. G. Christians (Eds.), *The handbook of mass media ethics* (pp. 217–228). Routledge.

Craufurd Smith, R., Klimkiewicz, B., & Ostling, A. (2021). Media ownership transparency in Europe: Closing the gap between European aspiration and domestic reality. *European Journal of Communication*, *36*(6), 547–562. https://doi.org/10.1177/0267323121999523

Curry, A. L., & Stroud, N. J. (2021). The effects of journalistic transparency on credibility assessments and engagement intentions. *Journalism*, *22*(4), 901–918. https://doi.org/10.1177/1464884919850387

De Laat, P. B. (2018). Algorithmic decision-making based on machine learning from big data: Can transparency restore accountability? *Philosophy & Technology*, *31*(4), 525–541.

Diakopoulos, N., & Koliska, M. (2017). Algorithmic transparency in the news media. *Digital Journalism*, *5*(7), 809–828. https://doi.org/10.1080/21670811.2016.1208053

Dragomir, M. (2019). *Media capture in Europe*. Media Development Investment Fund.

Entidade Reguladora para a Comunicação Social. (2020). *Relatório de regulação 2019*. https://www.flipsnack.com/ercpt/erc-relat-rio-de-regula-o-2019/full-view.html

Entidade Reguladora para a Comunicação Social. (2022). *Relatório de regulação 2021*. https://www.erc.pt/download.php?fd=12855&l=pt&key=bc4ddcc6d69ae573d5f148d6c3659094

Figueiras, R., & Ribeiro, N. (2013). New global flows of capital in media industries after the 2008 financial crisis: The Angola–Portugal relationship. *The International Journal of Press/Politics*, *18*(4), 508–524. https://doi.org/10.1177/1940161213496583

Hall, S., Critcher, C., Jefferson, T., Clarke, J., & Roberts, B. (2017). *Policing the crisis: Mugging, the State and law and order*. Bloomsbury Publishing.

Heim, K., & Craft, S. (2020). Transparency in journalism: Meanings, merits, and risks. In L. Wilkins & C. G. Christians (Eds.), *The Routledge handbook of mass media ethics* (pp. 308–320). Routledge.

Henriques, A. (2013). *Corporate truth: The limits to transparency*. Routledge.

Holtz, S., & Havens, J. C. (2009). *Tactical transparency: How leaders can leverage social media to maximize value and build their brand*. John Wiley & Sons.

Jenkins, J., & Jerónimo, P. (2021). Changing the beat? Local online newsmaking in Finland, France, Germany, Portugal, and the UK. *Journalism Practice*, *15*(9), 1222–1239. https://doi.org/10.1080/17512786.2021.1913626

Karlsson, M. (2010). Rituals of transparency: Evaluating online news outlets' uses of transparency rituals in the United States, United Kingdom and Sweden. *Journalism Studies*, *11*(4), 535–545. https://doi.org/10.1080/14616701003638400

Karlsson, M. (2020). Dispersing the opacity of transparency in journalism on the appeal of different forms of transparency to the general public. *Journalism Studies*, *21*(13), 1795–1814. https://doi.org/10.1080/1461670X.2020.1790028

Karlsson, M., & Clerwall, C. (2019). Cornerstones in journalism: According to citizens. *Journalism Studies*, *20*(8), 1184–1199. https://doi.org/10.1080/1461670X.2018.1499436

Kovach, B. & Rosenstiel, T. (2001). *The elements of journalism: What news people should know and the public should expect*. Three Rivers Press.

Lacy, S., & Rosenstiel, T. (2015). *Defining and measuring quality journalism*. Rutgers School of Communication and Information.

Lei n.º 53/2005, de 08 de novembro, Diário da República n.º 214/2005, Série I-A de 2005-11-08 (2005). https://diariodarepublica.pt/dr/detalhe/lei/53-2005-583192

Lei n.º 78/2015, de 29 de julho, Diário da República n.º 146/2015, Série I de 2015-07-29 (2015). https://diariodarepublica.pt/dr/detalhe/lei/78-2015-69889523

Lindgren, A., Jolly, B., Sabatini, C., & Wong, C. (2019). *Good news, bad news: A snapshot of conditions at small-market newspapers in Canada*. National News Media Council.

Meier, W. A., & Trappel, J. (2022). Media transparency: Comparing how leading news media balance the need for transparency with professional ethics. In J. Trappel & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 255–273). Nordicom; University of Gothenburg. https://doi.org/10.48335/9789188855589-12

Miranda, J., & Camponez, C. (2022). Accountability and transparency of journalism at the organizational level: News media editorial statutes in Portugal. *Journalism Practice*, 1–21. https://doi.org/10.1080/17512786.2022.2055622

Noam, E. (2014). Does media management exist? In P. Faustino, E. Noam, C. Scholz, & J. Lavine (Eds.), *Media industry dynamics* (pp. 27–41). Formalpress | Media XXI.

Noam, E. (2018). Beyond the mogul: From media conglomerates to portfolio media. *Journalism*, *19*(8), 1096–1130. https://doi.org/10.1177/1464884917725941

Picard, R. (2005). Unique characteristics and business dynamics of media products. *Journal of Media Business Studies*, *2*(2), 61–69. https://doi.org/10.1080/16522354.2005.11073433

Picard, R., & Pickard, V. (2017). *Essential principles for contemporary media and communications policymaking*. Reuters Institute for the Study of Journalism.

Poell, T., Nieborg, D. B., & Duffy, B. E. (2022). *Platforms and cultural production*. Polity Press.

Rabaça, C. (2002). *O regime jurídico-administrativo da concentração dos meios de comunicação social em Portugal*. Almedina.

Regulamento 835/2020, de 2 de outubro, Diário da República n.º 193/2020, Série II de 2020-10-02 (2020). https://diariodarepublica.pt/dr/detalhe/regulamento/835-2020-144456439

Russell, F. M. (2019). The new gatekeepers: An institutional-level view of Silicon Valley and the disruption of journalism. *Journalism Studies*, *20*(5), 631–648. https://doi.org/10.1080/1461670X.2017.1412806

Schiffrin, A. (2018). Introduction to special issue on media capture. *Journalism*, *19*(8), 1033–1042. https://doi.org/10.1177/1464884917725167

Schudson, M. (2008). *Why democracies need an unlovable press*. Polity Press.

Silva, E. C. e. (2014). Crisis, financialization and regulation: The case of media industries in Portugal. *The Political Economy of Communication*, *2*(2), 47–60.

Singer, J. (2006, August 10–13). *Truth and transparency: Bloggers' challenge to professional autonomy in defining and enacting two journalistic norms* [Paper presentation]. Annual Meeting of the Association for Education in Journalism and Mass Communication, Anaheim, United States of America.

Sjøvaag, H., & Ohlsson, J. (2019). *Media ownership and journalism*. Oxford Research Encyclopedia of Communication. https://oxfordre.com/communication/view/10.1093/acrefore/9780190228613.001.0001/acrefore-9780190228613-e-839

Strömbäck, J. (2005). In search of a standard: Four models of democracy and their normative implications for journalism. *Journalism Studies*, *6*(3), 331–345. https://doi.org/10.1080/14616700500131950

Trappel, J., & Tomaz, T. (2021). Democratic performance of news media: Dimensions and indicators for comparative studies. In J. Trappel & T. Tales (Eds.), *The media for democracy monitor 2021: How leading news media survive digital transformation* (Vol. 1). Nordicom; University of Gothenburg.

Appendix

Before April 2021, the reporting model used by the Portuguese Regulatory Authority for the Media only included three of the subcategories under the "financial characterisation" category: "financial flows", "relevant customers", and "holders of relevant liabilities". In this research, only the subcategories were considered whenever the regulatory authority marked both the category and subcategories. When it only marked the category, it was assumed that all three subcategories were omitted.

As of April 2021, a comprehensive table listing all the categories and subcategories provided in the legislation was introduced for public reference (Table A1). The new reporting model was implemented for only five companies, and the occurrences were assigned to the respective category for consistency in the methodological standardisation. Finally, the categories and subcategories encompassing "financial characterisation" and the category "corporate governance report" were broken down by calendar year.

Categories	Subcategories
1. General identification data	1.1. Representative's name (nominal) material reporting condition — access to the platform
	1.2. Share capital
	1.3. Indicates main activity
2. Composition of governing bodies	2.1. Identification of all governing bodies (including composition)
	2.2. Identification of the members of each governing body
3. Identification of share capital structure/ shareholdings	3.1. Identification of direct ownership (including usufruct)
	3.2. Breakdown of percentages (direct ownership)
	3.3. Identification of the allocation chain for qualifying holdings (5% or more of the capital/vote)
	3.4. Direct or indirect shareholdings in other media organisations
4. Media organisations owned — identification	4.1. Identification of those responsible for the editorial direction of each media organisation
	4.2. Identification of programme services and respective editorial managers (radio and television operators only)
5. Financial characterisation (means of funding)	5.1. Financial flows (5.1.1. Equity; 5.1.2. Equity; 5.1.3. Total assets; 5.1.4. Operating results; 5.1.5. Net profit; 5.1.6. Total income amounts; 5.1.7. Amounts of total liabilities on the balance sheet; 5.1.8. Total amounts of contigent liabilities)
	5.2. Relevant clients
	5.3. Relevant liability holders
	5.4. Balance sheet and profit and loss account/simplified business information statements

6. Complete corporate governance report	6.1. Identification of company officers
	6.2. Name and function of the members
	6.3. Biographic note
	6.4. Governance model (executive/non-executive bodies)
	6.5. Powers and operation of the governing bodies
	6.6. Description of the additional professional activities of the members of the governing bodies
	6.7. Indication of whether the members of the governing bodies are remunerated within the scope of their duties at the media organisation.
	6.8. Statement on the existence of internal control systems and the reporting of any discrepancies in overseeing the obtained financial resources
	6.9. Organisation chart or functional maps
	6.11. Chartered accountant/auditor (Identification)
	6.12. Chartered accountant/auditor (remuneration)
	6.13. Statutes and other internal regulations
	6.14. Distribution and delegation of powers
	6.15. Description of the systems (if any) for internal control systems and the reporting of any irregularities in overseeing the obtained financial resources
	6.16. Detailed description of the mechanisms to mitigate the risks of irregularity in obtaining financial resources and any conflicts of interest
	6.17. Description of the mechanisms for assessing whether the interests of the members of the management body are aligned with those of the company
	6.18. Description of the remuneration policy for the management and supervisory bodies, including criteria for defining the variable component of remuneration, if any
	6.19. Mechanisms for internal and external reporting of irregularities
	6.20. Indicators on audiences, print runs and circulation
	6.21. Mechanisms for editorial independence
	6.22. Editorial status of the media organisation(s)
	6.23. Indication of the person accountable for the editorial tasks within the media organisation(s)
	6.24. Professional and academic background information about the editor(s) in charge
	6.25. Remunerated additional activities of editorial managers If there are no additional activities, this should be specified
	6.26. Editorial structure of the media organisation(s)
	6.27. Composition of the Editorial Board, status and key decisions during the reviewed period
	6.28. Budgetary autonomy of editorial managers
	6.29. Editorial guidelines and codes of conduct

Table A1. *Matrix of categories and subcategories outlining mandatory reporting information stipulated by Law no. 78/2015 and Regulation no. 835/2020*

Biographical Notes

Alexandra Figueira is the director of the master's degree in Communication, Marketing, and Digital Media at Universidade Lusófona — Centro Universitário do Porto and assistant director of the degree in Communication Sciences. She teaches in the areas of journalism, strategic communication, and applied communication. She was an active journalist in national media outlets in the written press for 27 years. She has a PhD in Communication Sciences from the Institute of Social Sciences at the University of Minho and postgraduate qualifications in Marketing (Instituto Português de Administração de

Marketing) and Economics (School of Economics at the University of Porto). Her journalistic and academic work has been honoured three times.

ORCID: https://orcid.org/0000-0002-8764-5690

Email: alexandra.figueira@ulusofona.pt

Address: Rua Augusto Rosa n.º 24, 4000-098 Porto

Elsa Costa e Silva is an assistant professor at the University of Minho and a researcher at the Communication and Society Research Centre. She regularly researches and publishes on media ownership, policies and regulation. She was a journalist for 10 years at one of Portugal's leading media organisations.

ORCID: https://orcid.org/0000-0002-7215-6384

Email: elsa.silva@ics.uminho.pt

Address: Centre for Communication and Society Studies, Institute of Social Sciences, University of Minho, 4710-057 Gualtar, Braga, Portugal

Submitted: 04/04/2023 | Accepted: 24/10/2023

Comunicação e Sociedade, vol. 44, 2023, e023022
https://doi.org/10.17231/comsoc.44(2023).4750

Responsibility and Quality of Journalism: Digital Accountability Instruments and Practices in the Portuguese Media

João Miranda
Centro de Estudos Interdisciplinares, Faculdade de Letras, Universidade de Coimbra, Coimbra, Portugal

Abstract

Although the public debate on the quality of journalism and media responsibility and accountability efforts is not novel, the recent online and digital transition context has facilitated the emergence and expansion of new forms of media responsibility and monitoring of the quality of journalistic information. This study draws on a literature review to explore the relationship between media accountability and the quality of journalism while also examining how new forms of media responsibility could enhance information quality. Three facets of this relationship are emphasised: accountability as a dimension or hallmark of media quality, accountability as a mechanism for controlling or assessing the quality of journalism, and accountability as a space for defining the quality of news information. Additionally, this paper presents and discusses findings from an exploratory study mapping and analysing the level of implementation of digital responsibility and accountability mechanisms of six Portuguese editorial projects. The mapping of instruments highlights the heterogeneous reality and potential underlying the adaptation of conventional responsibility models to online formats, as well as underscores the mandated nature of media accountability and transparency processes in the Portuguese media. The analysis of the level of implementation of these mechanisms indicates asymmetries in their application.

Keywords
media accountability, digital journalism, quality of journalism, media responsibility, transparency

Responsabilização e Qualidade do Jornalismo: Instrumentos e Práticas Digitais de Accountability dos Média Portugueses

Resumo

Embora o debate público sobre a qualidade do jornalismo e esforços de responsabilização e de prestação de contas por parte dos média não constituam um fenómeno contemporâneo, o novo contexto online e de transição digital possibilitou o surgimento e a expansão de novas formas de responsabilização dos média e de monitorização da qualidade da informação jornalística. Com base na revisão da literatura, busca-se desenvolver uma reflexão sobre a relação entre *accountability* dos média e qualidade do jornalismo, assim como sobre o potencial de novos formatos de responsabilização dos média na promoção da qualidade da informação. São sublinhadas três vertentes dessa relação: a *accountability* enquanto dimensão ou marca da qualidade dos média; a *accountability* enquanto modo de controlo da qualidade do jornalismo; e a *accountability* enquanto espaço de definição da qualidade da informação noticiosa. Simultaneamente, são apresentados e discutidos os resultados de um estudo exploratório de mapeamento e de análise do nível de implementação de mecanismos digitais de responsabilização e prestação de contas de seis projetos editoriais portugueses. O mapeamento de instrumentos reflete uma realidade heterogénea e um potencial subjacente à adaptação de modelos convencionais de responsabilização para formatos online, assim como um paradigma mandatado dos processos de *accountability* e de transparência dos média portugueses. Já a análise do nível de implementação de vários destes mecanismos de responsabilização sugere assimetrias na sua aplicação.

Palavras-chave
accountability dos média, jornalismo digital, qualidade do jornalismo, responsabilidade dos média, transparência

1. Introduction

The social, cultural, economic and political challenges surrounding the role and place of journalism today suggest a renewed interest in and debate about media accountability and transparency (Eide, 2016; Ramon, 2020; van der Wurff & Schönbach, 2014). Public concerns about the quality of journalism and the media's responsibility and accountability efforts are not a new or contemporary phenomenon (Eberwein et al., 2019; Plaisance, 2000). However, the digital shift and the rise of a new online environment have opened new avenues for enhancing and expanding these journalism quality monitoring processes (Acharya, 2015; Fengler et al., 2011).

Building on a discussion launched by Miranda (in press), this article explores the relationship between media accountability and the quality of journalism. It will also present and discuss the findings of a more specific exploratory study into the digital responsibility and accountability mechanisms of six Portuguese editorial projects.

2. Media Accountability and the Quality of Journalism

Fengler et al. (2021) argue that "[i]n media and communication research, various terms and concepts are used to describe the processes of quality management within and beyond the journalistic profession" (p. 5). Along with notions such as "self-regulation", "transparency", or "governance of journalism", media accountability is characterised by its holistic nature, which involves multiple stakeholders in journalism's accountability and responsibility processes.

Although it can be difficult to translate the full meaning of media accountability and the plurality of contributions to the interpretation of the term, one definition across the literature is that of Denis McQuail (see McQuail & Deuze, 2020), who includes in this concept all the processes, voluntary or involuntary, from which the media are responsible and accountable not only for the consequences but also for the quality of their actions and what they have made public. More specifically, Fengler et al. (2011) define media accountability as the set of "informal institutions, both offline and online, performed by both media professionals and media users, which intends to monitor, comment on and criticise journalism and seeks to expose and debate problems of journalism" (p. 20). As such, media accountability has a broader meaning than transparency and extends further than the narrower field of self-regulation, as it acknowledges not only journalists but also other stakeholders, such as media owners or users, as active participants in promoting, managing and controlling the quality of journalistic information (Bertrand, 2008; Fengler, 2019).

In fact, the array of mechanisms that activate and materialise responsibility in journalism is notably extensive and diverse, encompassing, for example, different types of documents (such as codes of ethics), processes (such as journalism education), as well as individuals or groups (such as ombudspersons or press councils; Bertrand, 2008, 2018). Furthermore, their origin extends far beyond the boundaries of the media and can either be internal or external to newsrooms and journalistic culture (Fengler et al., 2014). Particularly concerning mechanisms originating from the media's initiative, the outcome of their actions can be classified based on when they come into play within the news production process: before, during or after publication or broadcast (Heikkilä et al., 2012). Considering the low impact that each of these instruments, separately, will have on the quality of journalism, the literature tends to emphasise the potential for cooperation or networking among these mechanisms, highlighting their collective influence as a system of infrastructures (Fengler et al., 2011).

In contrast to more imposing or coercive legal-based solutions (liability), studies on media accountability highlight the positive aspects of what McQuail (see McQuail & Deuze, 2020) calls the "answerability model", which entails a dialogical and voluntary approach to responsibility in journalism. However, it also involves the willingness of news organisations and professionals to accept criticism from audiences and to engage in public debate about journalistic practices and news production (Brants & de Haan, 2010; Christians, 2009). As the legal system struggles to keep pace with the swiftly evolving media landscape and in light of excessive regulation risks, this second model is commonly associated with perspectives that reconcile safeguarding journalism's responsibilities and social functions with preserving press freedom. Nevertheless, these conceptions acknowledge the essential role of regulatory measures involving state intervention in preventing potential harm and risks stemming from the media's actions. As McQuail (1997) concludes, "the emphasis in the first instance [liability] is likely to be on issues of harm caused by the media, in the second [answerability] on issues of mass media quality" (p. 517).

Defining the essence of the quality of journalism is not just difficult but rather complex. It could be contingent on the anticipated uses and gratifications derived from the media (Jacobsson & Jacobsson, 2010; Neuberg, 2014) or the characteristics and attributes of the product or content under scrutiny (Fengler, 2008). Additionally, the concept of quality in journalism might be rooted in the set of standards defined by the moral action of the media and journalists (Jacobsson & Jacobsson, 2010), as well as the adequacy of their practices and work to the values underlying their role in society (Meier, 2019).

Moreover, stemming from these normative concepts, the quality of journalism can be appraised using criteria such as diversity, relevance, ethics, impartiality, comprehensibility, or accuracy inherent in the outcomes of journalistic work (Urban & Schweiger, 2014). Despite the multidimensionality underlying the concept, these different meanings suggest an inherent relationship between the quality of journalism and the media responsibility processes.

From an eminently self-regulatory perspective, one can argue that accountability dynamics tend to provide journalists and the media with tools for production but also for prevention and correction aimed at ensuring that their work meets information quality standards (Fengler, 2008).

Regarding their participatory or public aspect, media accountability processes primarily serve as mechanisms for monitoring and social control over the quality of information (Acharya, 2015; Bertrand, 2018). Groenhart (2012) takes this reflection a step further when the author emphasises the role of these public access mechanisms in communication on the modes of operation and principles that guide the news production process. These instruments provide the public with the information, or the "vocabulary", from which they can assess the quality of journalism.

On the other hand, Groenhart (2012) admits that implementing accountability and transparency mechanisms, like authors' biographical profiles, newsletters or charters of principles or mission statements, could convey a sense of authenticity and professional rigour, functioning as a "trade mark" of quality journalism.

Considering its more dialogical dimension or that of drawing public (and also media) attention to the reality of journalism and newsrooms (Groenhart, 2012; McQuail, 2003), public accountability of the media can not only influence in adapting the conduct of journalism to socially established standards of information quality but also ultimately contribute in defining these standards.

As Ward (2014) or Ananny and Crawford (2018) alert, however, a more extensive interpretation of these processes must acknowledge their limitations or the fact that the implementation of accountability instruments may not necessarily have positive effects on the quality of information — some of these responsibility practices and, above all, transparency practices (or how they are implemented) may even conflict with ethical and responsible journalism.

3. Media Accountability in the Online Landscape

Recent works — such as those by Bastian (2019), Mauri-Rios et al. (2022) and Suárez-Villegas et al. (2017) — outline three fundamental dimensions for identifying and systematising contemporary media accountability mechanisms. The first concept, self-regulation, encompasses the standards guiding journalistic work and underpins the commitment made to the public. The second, transparency, refers to different efforts to disclose journalistic structures and the news creation processes. The final dimension, participation, refers to the procedures and instruments enabling interaction between the media and the public and facilitating the intervention of the users of news.

More specifically, the relevance of the latter concept is intricately linked to a paradigm shift in the media ecosystem and the rise of new participatory communication formulas, which have not only challenged the dominance of established media in accessing public space but have also facilitated new modes of interaction between these media and their audiences. They have made it more convenient and accessible for users to criticise and monitor the quality of journalism (Bernier, 2013; García-Avilés, 2019).

It is also amid the digital transition and reconfiguration of the communications landscape that contributions such as those by Fengler et al. (2011) suggest a conceptual distinction between "established instruments", such as ombudspersons, letters to the editor or press councils, and "innovative instruments" of media accountability. This distinction aims to systematise the array of mechanisms and procedures emerging in the online environment. Similarly, these new digital mechanisms can be divided into web-specific instruments — such as hyperlinks to primary sources or tools for users to suggest corrections — and instruments developed by replicating or transposing conventional instruments into online formats.

Considering the relatively limited impact and reach of traditional media accountability and self-regulation models (Alsius et al., 2014), new online forms of responsibility have garnered attention in academic and professional circles. This attention arises from their potential to address the weaknesses or shortcomings of conventional formats.

In addition to lower costs or easier implementation, the underlying potential for accessibility, communication and synchronism these emerging mechanisms entail (Acharya, 2015; Fengler, 2019) suggest a broader array of opportunities for media accountability and an increased reach and impact of the network of mechanisms involved in monitoring and upholding information quality — including these new instruments' potential to intervene in systems or environments characterised by a poor professional culture or limited civil society involvement (Lauk & Denton, 2011, as cited in Groenhart, 2012).

However, in the wake of the participatory potential of web 2.0, one of the main premises of these new models, whether developed by news organisations or emerging from other sectors of society, lies in the possibility of engaging citizens in the public debate on the responsibilities and social role of the media and the improvement in the quality of journalism (García-Avilés, 2019; Pérez-Díaz et al., 2020), ultimately giving meaning and purpose to the different public criticisms arising in different areas of the online landscape (Bernier, 2013; Chaparro-Domínguez et al., 2021).

As Meier (2019) concludes, "[q]uality in journalism cannot rest on the shoulders of individual journalists and newsrooms 'alone', and "[m]any initiatives and institutions in society must work together in a pluralistic process in order to strengthen quality in journalism" (p. 5). On the part of news organisations and journalists, this mindset will entail a more dialogical conception of professional ethics, not only recognising the public and other agents of society as partners in activating and materialising accountability processes but also making them co-responsible for the quality of information (Culver, 2017; Ward & Wasserman, 2015).

4. Media Accountability in Portugal

Throughout the democratic period, the regulation of Portuguese journalism has been characterised by constant institutional reorganisation, a rather fragile model of self-regulation and what Camponez (2011) describes as a process of "juridification" of journalists' professional ethics. Nevertheless, based on studies such as those by Miranda (2019), Camponez (2011), Fidalgo (2009), Moutinho et al. (2018) or Renedo-Farpón et al. (2022), it is possible to identify a wide range of instruments in Portugal, with different levels of institutionalisation, that play a role in media responsibility and transparency.

In contrast to what Bertrand (2018) identifies as the more elective dimension of accountability, the media accountability paradigm in Portugal can also be read in the light of what Miranda and Camponez (2022) characterise as a "mandated" approach to these processes, referring to the replacement of voluntary initiative by legal requirements or recommendations for the implementation of journalistic accountability instruments. In fact, this type of mandate can be found in the Statute of Journalist (Lei n.º 1/99, 1999), the Press Law (Lei n.º 2/99, 1999) or other legal provisions.

Although online experiences of accountability in Portuguese journalism materialise in a late and somewhat limited context (Miranda, 2019; Moutinho et al., 2018), new digital formulas for responsibility and transparency have emerged and spread in Portuguese media (Christofoletti et al., 2019; Miranda, in press; Renedo-Farpón et al., 2022).

5. Objectives and Methodology

Despite the various contributions highlighted in the previous section, the paradigm of digital accountability mechanisms in Portuguese media still lacks a more in-depth characterisation and systematisation.

In this context, the main objectives (O) of this exploratory study are: (O1) to contribute to the mapping of the digital accountability instruments of the Portuguese media; and (O2) to understand the extent and ways in which these instruments are implemented.

With the specific objectives of this research in mind, this study focuses on the analysis of a sample of journalistic editorial projects comprising the digital versions of two print media (*Público* and *Expresso*), two digital natives (Observador and Notícias ao Minuto) and two news segments from online portals (SAPO24 and ZAP aeiou). The selection of these media is based on audience and consumption data from the Associação Portuguesa de Circulação e Tiragem (n.d.) and the findings of the study by Newman et al. (2022). *Público* is a quality daily newspaper founded in 1990 and launched its online version in 1995. The website of the weekly *Expresso* (founded in 1973) was launched in 1997. Among the digital natives, Observador began its activity in 2014. Founded in 2012, the editorial project Notícias ao Minuto favours shorter news stories (Zamith, 2015). Unlike the other three media outlets, which adopt a business model based on subscriptions, the latter focuses on distributing free information and advertising revenue. The SAPO24 and ZAP aeiou projects represent the news segments of the SAPO and aeiou portals, respectively.

In order to answer O1, adopting the methodological options pursued by Mauri-Ríos and Ramon-Vegas (2015), a first approach to the study aimed to trace the digital accountability mechanisms implemented by the six news organisations. Mapping these mechanisms was based on systematising the instruments identified in previous studies (Table 1), complemented by using non-probabilistic sampling procedures from the websites and other digital channels of the analysed media. The mapping was accompanied by applying content analysis strategies to identify key characteristics of the systematised instruments, namely their digital nature (replication of offline formats or specific to the web) or their framework (self-regulation, transparency or participation).

Authors	Year
Renedo-Farpón et al.	2022
Pérez-Díaz et al.	2020
Fengler and Speck	2019
García-Avilés	2019
Christofoletti et al.	2019
Suárez-Villegas et al.	2017
Mauri-Ríos and Ramon-Vegas	2015
Koliska	2015
Fengler et al.	2014
Bichler et al.	2012
Heikkilä et al.	2012
Fengler et al.	2011
Meier and Reimer	2011
Bertrand	2008

Table 1. *Previous studies underlying the mapping of digital media accountability mechanisms*

Seeking to expand and elaborate the characterisation of the practices and instruments identified in the first stage of the study and drawing on the procedures applied by García-Avilés (2019) and, in particular, Pérez-Díaz et al. (2020), the second approach focused on analysing the implementation of 15 digital accountability instruments that represent the three phases described in the literature review, promoted by at least one of the news organisations. This second approach also aims to answer O2. Using a code sheet with performance categories, such as frequency, function or results of the mechanisms, a content analysis was carried out over nine months (from July 2022 to March 2023) in non-consecutive weeks. Each instrument in each organisation was classified according to its level of implementation: consistently implemented (1 point; ●), irregularly implemented (0.5 points; ◑) or not implemented (0 points; ○). No advertising or opinion content was considered in this second part of the analysis[1].

6. Mapping Media Accountability Instruments and Practices

The first segment of this study identified 40 digital accountability instruments among the analysed news organisations (Figure 1). These instruments range from permanent and established procedures to occasional or irregular solutions. While they have specific features of their implementation and activation, this list does not suggest radically different or original elements compared to surveys in other geographical areas. Furthermore, there are no significant differences from previous mappings of the broader Portuguese media scene (Miranda, in press) — however, the lack of permanent media monitoring sections or the absence of clear or more detailed information on funding sources stand out.

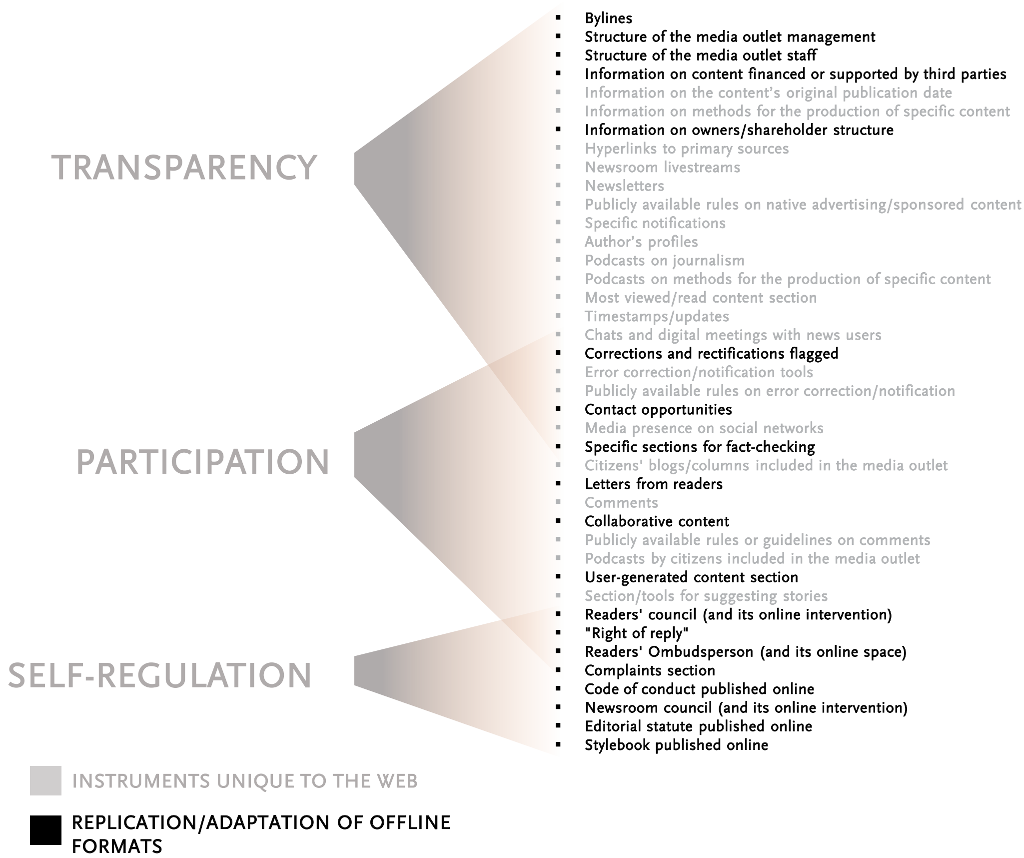

Figure 1. *Mapping of digital media accountability practices and instruments implemented by the news organisations analysed*

[1] In order to confirm and further analyse elements of the information obtained, exploratory interviews were conducted with the editors of a number of the media analysed.

Among this list of instruments, 21 are specific web mechanisms, such as error reporting systems or hyperlinks to the primary sources. The remaining 19 are ways of replicating traditional mechanisms in a digital context. Within the latter field, it is possible to differentiate between practices of reproducing conventional mechanisms in the media's digital channels — as is the case, for example, with editorial statutes — or efforts to adapt these traditional instruments to suit the digital potential — as seen in *Livro de Estilo* (Stylebook) do *Público*, or, as will be discussed later, in the right of reply procedures implemented by *Expresso*. In both cases, the digital transition tends to amplify the opportunities for media accountability and responsibility, facilitating accessibility and increasing their reach. Notably, *Livro de Estilo* (n.d.) do *Público* encourages reader participation by inviting them to suggest changes to its chapters, promoting active engagement in its design and improvement.

However, the mechanisms specific to the online environment predominantly focus on transparency. In addition to examples like digital meetings with users or references to content publication dates, the traditional media under review include the promotion of different types of podcasts, which, broadly targeted or more specialised and on an ad hoc basis, contribute to explaining the inner workings of newsrooms, the processes involved in news production, or the methodologies and sources behind particular stories.

Notwithstanding the voluntary nature of several media transparency and self-regulation mechanisms, it is also worth noting that references to information regarding editorial project principles and guidelines or media management often align with legally mandated requirements and recommendations, as stipulated in laws such as the Press Law (Lei n.º 2/99, 1999) or the Media Transparency Law (Lei n.º 78/2015, 2015).

7. Implementation of Media Accountability Instruments and Practices

7.1. Before Production

According to Pérez-Díaz et al. (2020), accountability practices in the media with an impact before news production encompass procedures related to content creation and include accountability instruments concerning the news organisation itself, its structure, and business strategies. Table 2 suggests cross-cutting transparency practices related to news organisations but also demonstrates varying degrees of application of these procedures and a tendency to comply with legal requirements. When describing the media's mission and objectives, the information provided typically circumscribes to the editorial statute, a mandatory element by law — there is no evidence of a voluntary effort to go beyond what is legally mandated.

		Expresso	Público	Notícias ao Minuto	Observador.	SAPO24	ZAP aeiou
Mission statement	T	◑	◑	◑	◑	◑	◑
Publicly available code of conduct/ethics	S/T	●	◑	○	○	○	○
Information on the structure of the editorial staff	T	●	●	●	●	◑	●
Ownership structure	T	●	●	●	●	●	●
Information on funding	T	◑	◑	○	○	○	○

Table 2. *Implementation of media accountability instruments with an impact before production*

Note. Participation (P), self-regulation (S), transparency (T); implemented (1 point; ●), irregularly implemented (0.5 points; ◑) and not implemented (0 points; ○)

Meanwhile, the public debate stirred by the 2019 revision of *Expresso*'s code of conduct (Martins, 2019) may exemplify the significance of this type of mechanism, not just as an instrument for self-regulation but also as a form of bond between the media and society. However, among the media outlets analysed, only *Expresso* and *Público* share their operational guidelines publicly — the former provides these through a dedicated subpage, and the latter presents this information within a section of its *Livro de Estilo* (n.d.), which is also accessible online.

Information about the organisations is usually included in the fact sheet or dedicated subpages, identified at the end of the menus or at the bottom of the websites across different media outlets. It is in the latter segment that *Público* includes information on the main financial flows. *Expresso* includes details about the business group at the bottom of its website, offering a link to Impresa's financial information. The inclusion or omission of information on news organisations' financial and managerial aspects is closely tied to the specific context of each editorial project and its respective media group. However, it is essential to view this through the lens of a set of obligations to declare this information to the Regulatory Authority for the Media, which might partially suppress the demand for this voluntary transparency initiative.

7.2. During Production

Attributing content authorship holds creators accountable and allows the public to check and control the quality of journalistic work. Except for articles produced as a direct adaptation of agency content or press releases, there is a widespread practice of signing journalistic content. There is, however, a notable difference between the procedures of news portals, where content is predominantly signed by the media outlet, and other editorial projects, where individual journalist signatures are more common. The unique setup of SAPO 24 cannot be dissociated from its editorial model, as content production results from a partnership with the MadreMedia agency.

In four media outlets analysed, content authorship is complemented by the authors' biographical data — although not all journalists provide this information (Table 3).

		Expresso	*Público*	Notícias ao Minuto	Observador.	SAPO24	ZAP aeiou
Authors' signatures	T	●	●	●	●	◑	◑
Author profiles	T	●	◑	○	●	◑	○
Support/funding of specific content	T	○	●	○	◑	○	○
Hyperlinks to primary sources	T	●	●	◑	●	◑	●
Corrections/updates	T/S	●	●	◑	●	◑	○

Table 3. *Implementation of media accountability instruments with an impact during production*

Note. Participation (P), self-regulation (S), transparency (T); implemented (1 point; ●), irregularly implemented (0.5 points; ◑) and not implemented (0 points; ○)

In addition to transferring practices for identifying support for the production of specific journalistic content into the online format — like using the formula "the newspaper visited (...) at the invitation of (...)" — there is evidence of leveraging digital resources' potential to more conspicuously and transparently indicate partnerships and the various sources of funding for particular journalistic content and editorial projects.

The identification of sources is a foundational and standard procedure in contemporary journalism. The media outlets examined strive to enhance these practices by incorporating hyperlinks to primary sources of the information — including content from their editorial projects, other media, external websites or other types of documentary sources, such as official statements, dispatches or legislation. Additionally, embedding original content from social networks is also common practice. Occasionally, public and/or official documents are made available through the media outlet's server as article sources.

The fast-paced and intensified environment of journalistic production underscores the importance of upholding values associated with correcting and rectifying errors. As journalism becomes more vulnerable to inaccuracies, the agility and information accessibility of digital platforms allow for swifter and more informed ways of correcting these errors (Karlsson et al., 2017; Plaisance, 2016; Saltzis, 2012). Most of the media analysed identify updates and corrections to their content. However, the frequency and methods of implementing these practices vary significantly. While projects such as Notícias ao Minuto or SAPO24 generally restrict their actions to simply indicating the existence of an update and the time of the change (usually at the end of the text), *Público*, Observador or *Expresso* go further by summarising the changes made and explaining the reason behind them. In this context, it is also worth highlighting the specific case of Observador, which devotes a subpage within its editorial project section to its policy for correcting and updating content. In the text, the media outlet begins by acknowledging the "real risk" of errors, commits to swift and transparent corrections, and provides detailed guidelines and procedures for specific situations: "correcting factual data"; "clarification of information"; "updates"; "correction of notifications"; "corrections and updates on social networks"; and "deletion of published content" (*Política de Correção*, n.d.). Although not exclusive to the digital sphere, Point 6 of *Expresso*'s code of conduct also states that "all factual or omission errors must be promptly and explicitly acknowledged and corrected, with due relevance" and that "when justified, a public apology must be issued" ("Código de Conduta dos Jornalistas do *Expresso*", 2008, Point 6). Related to correction and rectification, although the right of reply is a legal requirement that predates the advent of the internet, procedures such as the one adopted by the *Expresso* website — establishing a network of hyperlinks between the content(s) targeted and the text of the right of reply — demonstrate the potential of online journalism to promote and expand media accountability.

7.3. After Production

The forms of media accountability with an impact after production identified in this study involve increased public participation and interaction between users of news and editorial projects. In this context, it is important to note that both digital natives and traditional media feature subpages dedicated to the different newsroom contacts, providing more direct contact with the content authors. Meanwhile, ZAP aeiou consolidates this information in its fact sheet. SAPO24's page does not provide clear and easily accessible contact details. Once again, this should be considered within the framework of the media outlet's editorial model and the project's specific context as a sub-segment of the online portal (Table 4).

		Expresso	*Público*	Notícias ao Minuto	Observador.	SAPO24	ZAP aeiou
Mechanisms for suggesting corrections	P	◑	●	○	●	○	○
Comments	P	◑	●	●	●	●	●
Contacts	P	●	●	●	●	○	●
Mechanisms for suggesting content	P	◑	○	○	●	○	○
Ombudsperson	P	○	●	○	○	○	○

Table 4. Implementation of media accountability instruments with an impact after production

Note. Participation (P), self-regulation (S), transparency (T); implemented (1 point; ●), irregularly implemented (0.5 points; ◑) and not implemented (0 points; ○)

Another opportunity for the public to engage in the accuracy and responsibility of journalistic information involves mechanisms for suggesting corrections. Both Observador and *Público* have tools to flag errors. The first uses a highlighted text at the end of articles, showcasing the author's email address and inviting readers to suggest corrections. In the second case, this tool consists of a button at the end of the content, linking to a dedicated form for error reporting. This procedure generates an email that can be received by the "last minute" section team or the online segment editors, the copy desks and, in the case of signed content, the author. As a rule, the online section coordinators handle these messages initially, liaising with various newsroom staff based on the type of error reported (such as typographical or factual errors).

Besides including an invitation to suggest corrections, Observador also encourages readers to add a "lead" for new news stories at the end of the articles. This feature serves the dual purpose of prompting more in-depth stories and inviting a more active role from readers in shaping the media outlet's agenda. Following a revamp implemented in March ("O Novo Clube Expresso: O que É, Para Quem, ao que Vem? E Como Pode Fazer Para Entrar?", 2023), *Expresso* has also adopted a highlighted text at the end of articles, similar to Observador's model, which allows for the submission of questions, suggestions or criticisms directly to the authors of the content.

User comments are often based on more or less constructive critical opinions regarding media conduct and the attributes of journalistic content offered, which can impact the perception of news quality and the responsibility of news organisations (Dohle, 2018; Prochazka & Obermaier, 2022). However, framing this user participation mechanism as a vehicle for media accountability should be given greater consideration (Eberwein, 2019; Ksiazek & Springer, 2020). The effectiveness of this approach might depend on the level of identification or anonymity of the comment authors (Shanahan, 2017) and the management or moderation model applied to these contributions (Reich, 2011). Ultimately, it will also involve how journalists and news organisations perceive the criticism emerging from these participatory spaces (Prochazka & Obermaier, 2022). For example, whether they ignore it, consider it, or actively engage in the debate.

Among the media outlets analysed, there is heterogeneity in how comment tools are implemented and managed. *Público* and Observador have the most similar models: both editorial projects reserve comments on the websites and their mobile applications for identified users; readers themselves moderate, and the participation management involves a scoring system or subscriber reputation — although *Público* limits daily comments to two and moderation actions to three for non-subscribers[2]. Both media outlets also have community rule subpages that outline scenarios demanding editorial team intervention, namely eliminating a record that "is false or presents a doubtful identity" (*Regras da Comunidade—As Regras dos Comentários*, n.d.). *Público* ("Comentários", n.d.) allows "the use of pseudonyms, as long as they are not used for purposes contrary to the community rules" (Critérios de Publicação, Point 6) but prohibits, for example,

[2] However, it should be noted that, as of November 2023, *Público* has restricted the possibility of commenting to subscribers only.

"comments that deliberately aim to disinform readers about electoral processes, legal issues or matters of public health and safety" (Critérios de Publicação, Point 3). Alongside the comments, this second newspaper provides a space for debate, "Fórum Público" (Public Forum), with a section dedicated to the media. Also, as part of the strategy implemented in March 2023, *Expresso* has once again boosted its commentary tools, although this is restricted to subscribers only. Concerning comments, *Expresso* mentions the media's promise to take part in the debate ("O Novo Clube Expresso: O que É, Para Quem, ao que Vem? E Como Pode Fazer Para Entrar?", 2023) — a practice identified in various articles, in which members of the editorial team reply to readers' questions and suggestions.

ZAP aeiou and SAPO24 do not explicitly or clearly outline their comments section's rules. Regarding the latter project and Notícias ao Minuto, the comments function is limited to users registered on the Facebook social network.

Similar to trends observed in other geographical areas (Enkin, 2021), Portugal has also experienced a decline in the presence and scope of public ombudspersons. Except for the public audiovisual sector, *Público* stands out among privately-owned Portuguese media for maintaining this position. Although their interventions and texts are not exclusively reserved for the online space, the newspaper's website provides a dedicated space for the ombudsperson, featuring their articles, an archive of previous ombudspersons' texts, and a subpage outlining the ombudsperson's "definition", their "responsibilities", the criteria for "appointment and termination of functions" and declarations of "incompatibilities" ("O que É o Provedor do Leitor", n.d.).

8. Summary and Discussion of Findings

The survey from the first phase of this study points to a rather broad and diverse array of digital media accountability instruments and practices. These encompass not only the digital replication of traditional formats — particularly regarding professional self-regulation — but also the emergence of new web-specific mechanisms — notably those inherent to a transparency dimension. The findings suggest that in the Portuguese context, the advent of a new online landscape has facilitated new opportunities to mobilise and broaden the scope of journalism quality monitoring processes, as well as expanding the potential for user participation and dialogue between the media and their audiences — for example, through digital meetings or debates in comment spaces. This growing participatory or public aspect of responsibility processes becomes all the more relevant when we understand accountability not only as a measure of media quality but also as a means of managing and socially "controlling" the quality of journalistic information (Bertrand, 2008). As the perspectives of media outlets and users regarding journalistic information quality might not necessarily align (Schwaiger et al., 2022), the evolution of these new interactive and dialogical forms of media accountability could play an important role in defining and consolidating the standards that govern the quality of journalism.

Another feature that underlies the findings of both phases of this study concerns the "mandated nature" (Miranda & Camponez, 2022) of the different instruments identified.

For instance, requirements such as the obligation to disclose data on media ownership and funding as specified in the Media Transparency Law (Lei n.º 78/2015, 2015) or the Press Law's (Lei n.º 2/99, 1999) stipulation for an editorial statute might contribute to the widespread adoption and reinforcement of methods that advocate and validate journalism quality. Along with comments sections, the mandated mechanisms demonstrate a consistent degree of implementation across all the media scrutinised in the study's second phase. Nevertheless, formalising these aspects might mitigate the voluntary nature of media accountability dynamics and could ultimately deter innovation and the adoption of alternative or complementary accountability formats.

To further delineate and expand on this characterisation, the second stage of the study focused on analysing the implementation of different digital accountability mechanisms. A general conclusion drawn from these findings is the heterogeneity in the frequency and methods through which the various editorial projects analysed pursue different responsibility and transparency processes.

The data in Figure 2 illustrates a higher diversity and increased implementation of the digital mechanisms analysed among the two more traditional media outlets. On the other hand, there is a lower occurrence and uniformity in implementing these digital tools within the news sections of online portals. This aspect should be considered in light of the fact that these news projects have a smaller editorial dimension and fewer resources. Additionally, they only represent a fraction of the means that provide broader and more diverse services.

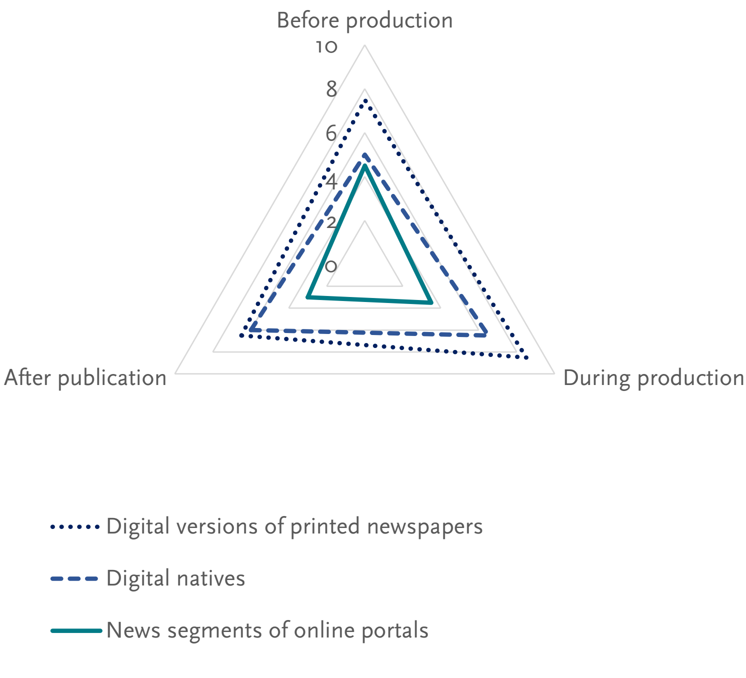

Figure 2. *Level of implementation of digital accountability mechanisms by the three types of media according to the three stages of news production*

Concerning digital native platforms, as shown in Figure 3, it is important to highlight the contrast between Observador — which tends to align more closely with traditional media — and Notícias ao Minuto, which shows less consistency, particularly in the application of mechanisms during and after the publication of content. Once again, the particular situation of this latter platform should be considered in context with its editorial model and objectives. Moreover, in line with the conclusions drawn by Pérez-Díaz et al. (2020), this scenario also suggests that rather than a dichotomy between traditional and new media, the asymmetries in implementing and experimenting with new digital formats for responsibility and transparency stem from cultural, technological, or financial factors. These encompass aspects such as the financial capacity of the media, their editorial objectives, or their business model and relationship with audiences. Notably, the highest levels of implementing digital accountability mechanisms are observed among the projects relying on subscription models and greater public involvement.

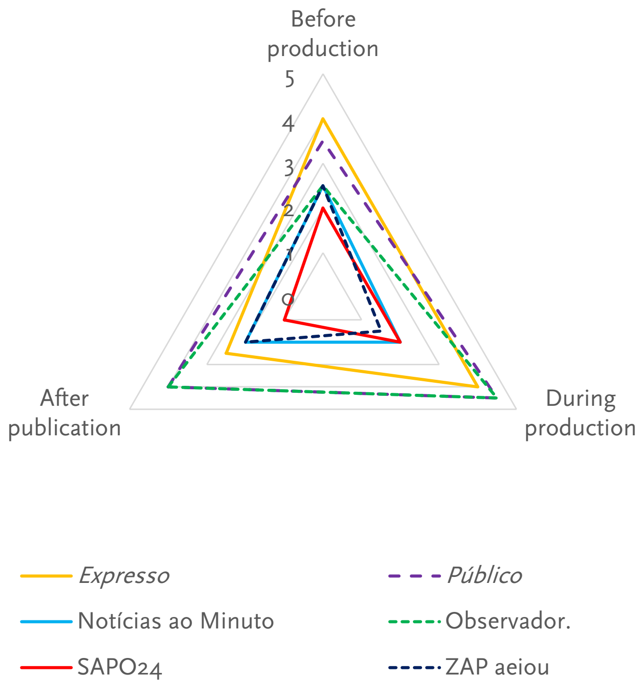

Figure 3. *Level of implementation of digital accountability mechanisms by the six media outlets analysed according to the three stages of news production*

Within this context, it is important to revisit the discussion on the dialogical dimension of the new accountability models. Expanding on previous observations, the interactive and participatory nature of these responsibility and transparency mechanisms plays a pivotal role in promoting news quality. The conduct and actions of news organisations and journalists are influenced by the awareness that they will have to answer to their audience and explain the news production processes (von Krogh, 2008). Concurrently, these dialogical dynamics could prompt the public to articulate their expectations regarding quality and responsible journalistic information while enabling the media to assist audiences in defining what constitutes quality journalism (van der Wurff & Schönbach, 2014). Although the discussion around *Expresso*'s code of conduct was fairly limited in time and scope, it shows that the potential for debate about the quality of journalism is not limited to interactive mechanisms; it can also emerge in the discussion about the instruments of accountability.

As Christians (2009) or Brants and de Haan (2010) argue, the success of these initiatives concerning responsibility in defining and promoting the quality of journalism heavily relies on the willingness of the media and professionals to engage in dialogue with the public. Despite comment boxes being the most commonly implemented voluntary mechanism, the instances of direct intervention by the editorial team in the ensuing discussions are limited, as observed. Ultimately, the lack of response from journalists to the criticisms and questions arising from these spaces could even have adverse consequences on the quality of the media or, at the very least, on how users perceive quality, as it creates a void in the debate that other players could occupy (Prochazka & Obermaier, 2022). These waves of participation may not always lead to constructive forms of dialogue or improved information quality (Waisbord, 2020). Journalists' appeal for increased active participation in these interaction processes must consider the potential risk of exacerbating work overload and professional fatigue among information professionals (Porlezza, 2019).

At the opposite end of the spectrum, the erosion of mechanisms such as the public ombudsperson — this figure is the instrument with the lowest representation among the media analysed — reflects the challenges in sustaining responsible, quality journalism. Indeed, in an environment of moderate expenditure and consolidation of new commercial strategies in journalism, the low cost and participation associated with these new models might even pose a risk of replacing established forms of promoting, assessing and controlling the quality of information (Evers, 2012).

9. Conclusions

Despite the elusive or ambiguous definition surrounding the quality of journalism and news (Molyneux & Coddington, 2020), this study aimed to briefly explore various associations between these concepts and the potential dynamics of media responsibility and accountability. In essence, the study sought to highlight three facets of this relationship: accountability as a dimension or hallmark of media quality, accountability as a mechanism for controlling or assessing the quality of journalism, and accountability as a space for defining the quality of news information.

In their more participative or public dimension, media accountability processes are, first and foremost, forms of promoting, managing and socially controlling the quality of journalistic information while also providing tools to guide the work of journalists and news organisations. Conversely, these processes can also enhance the professionalism and credibility of information and editorial projects.

The ongoing digital transition and the emergence of a new online landscape have expanded new opportunities for mobilising and broadening the scope of these journalism quality monitoring processes. They have also heightened the potential for user participation and dialogue between the media and their audience.

A more comprehensive analysis of the digital accountability mechanisms implemented by the media analysed in this study tends to highlight, on the one hand, the heterogeneous reality and potential underlying the adaptation of conventional responsibility models to online formats. It also underscores the mandated nature of media accountability and transparency processes, suggesting the need for further in-depth research into this phenomenon.

Notwithstanding the advantages and possibilities underlying increased user intervention and participation in monitoring the quality of information, as previously highlighted, this potential should be approached with some caution. Therefore, considering the prevalence of the participatory domain among the innovative instruments identified, it is also imperative to conduct further research on journalists' expectations and attitudes towards these new dynamics and possibilities for media accountability.

Furthermore, a more specific analysis of the level of implementation of several of these mechanisms indicates some disparities and asymmetries in their application. These disparities encompass differences between a more public dimension of their actions and limitations to intervention accessible only to members or subscribers. While instruments such as the podcasts identified in the mapping, the commentary tools analysed in the second segment of the study or other mechanisms aimed at the media outlets' community portray a higher level of transparency, they may also mirror the commercial strategy of these organisations, prompting further investigation into the relationship between these elements.

Although it aims to contribute to an exploratory approach to the reality of digital accountability mechanisms in the Portuguese media, this study has some limitations. It should be noted that the analysis focuses on a restricted sample, though it intends to illustrate different realities of Portuguese digital media. Moreover, it addresses a specific analysis period and may not reflect accountability dynamics beyond this time frame. In this context, the possibilities for further studies presented here may assist in mitigating these limitations.

Translation: Anabela Delgado

References

Acharya, B. B. (2015). Media accountability on digital platforms: The role of audience. *Amity Journal of Media & Communication Studies*, *5*(1–2), 81–92.

Alsius, S., Rodríguez-Martínez, T., & Mauri de los Rios, G. (2014). Little impact? Journalists' perceptions of traditional instruments of media self-regulation. In S. Fengler, T. Eberwein, G. Mazzoleni, C. Porlezza, & S. Russ-Mohl (Eds.), *Journalists and media accountability. An international study of news people in the digital age* (pp. 99–114). Peter Lang.

Ananny, M., & Crawford, K. (2018). Seeing without knowing: Limitations of the transparency ideal and its application to algorithmic accountability. *New Media & Society*, *20*(3), 973–989. https://doi.org/10.1177/1461444816676645

Associação Portuguesa para o Controlo de Tiragem e Circulação. (n.d.). *Análise simples*. Retrieved May 30, 2022, from https://www.apct.pt/analise-simples

Bastian, M. (2019). *Media and accountability in Latin America: Framework - Conditions - Instruments*. Springer VS. https://doi.org/10.1007/978-3-658-24787-4

Bernier, M.-F. (2013, July 3). *The Wentegate or the rise of citizens as fifth estate and spontaneous media co-regulators* [Conference presentation]. The 3rd World Journalism Education Conference, Mechelen, Belgium.

Bertrand, C.-J. (2008). M* A* S in the present world. An overview of media accountability systems. In T. von Krogh (Ed.), *Media accountability today... and tomorrow: Updating the concept in theory and practice* (pp. 23–39). Nordicom; University of Gothenburg.

Bertrand, C.-J. (Ed.). (2018). *Media ethics and accountability systems*. Routledge. https://doi.org/10.4324/9781351289641

Bichler, K., Harro-Loit, H., Karmasin, M., Kraus, D., Lauk, E., Loit, U., Fengler, S., & Schneider-Mombaur, L. (2012). *Best practice guidebook: Media accountability and transparency across Europe*. Erich Brost Institute; Institute of Journalism and Communication of the University of Tartu; Medienhaus Wien GmbH.

Brants, K., & de Haan, Y. (2010). Taking the public seriously: Three models of responsiveness in media and journalism. *Media, Culture & Society*, *32*(3), 411–428. https://doi.org/10.1177/0163443709361170

Camponez, C. (2011). *Deontologia do jornalismo: A autorregulação frustrada dos jornalistas portugueses*. Almedina.

Chaparro-Domínguez, M.-Á., Pérez-Pereiro, M., & Rodríguez-Martínez, R. (2021). Media accountability in the age of social media: Participatory transparency of the audience in Spain. *Global Media and Communication*, *17*(3), 281–296. https://doi.org/10.1177/1742766521990417

Christians, C. G. (Ed.). (2009). *Normative theories of the media: Journalism in democratic societies*. University of Illinois Press.

Christofoletti, R., Villegas, J. C. S., & Vegas, X. R. (2019). Accountability e transparência na mídia: O exemplo da Espanha para os países lusófonos. *Mediapolis – Revista de Comunicação, Jornalismo e Espaço Público*, *9*, Artigo 9. https://doi.org/10.14195/2183-6019_9_6

Código de conduta dos jornalistas do Expresso. (2008, January 5). *Expresso*. https://expresso.pt/sobre/codigo-conduta/2008-01-05-Codigo-de-Conduta-dos-jornalistas-do-Expresso-2366503d

Comentários. (n.d.). *Público*. Retrieved March 20, 2023, from https://www.publico.pt/nos/comentarios

Culver, K. B. (2017). Disengaged ethics. *Journalism Practice*, *11*(4), 477–492. https://doi.org/10.1080/17512786.2015.1121788

Dohle, M. (2018). Recipients' assessment of journalistic quality: Do online user comments or the actual journalistic quality matter? *Digital Journalism*, *6*(5), 563–582. https://doi.org/10.1080/21670811.2017.1388748

Eberwein, T. (2019). "Trolls" or "warriors of faith"?: Differentiating dysfunctional forms of media criticism in online comments. *Journal of Information, Communication and Ethics in Society*, *18*(4), 575–587. https://doi.org/10.1108/JICES-08-2019-0090

Eberwein, T., Fengler, S., & Karmasin, M. (2019). Theory and practice of media accountability in Europe: An introductory overview. In T. Eberwein, S. Fengler, & M. Karmasin (Eds.), *Media accountability in the era of post-truth politics* (pp. 18–35). Routledge.

Eide, M. (2016). Digital transparency and accountability. In B. Franklin & S. Eldridge II (Eds.), *The Routledge companion to digital journalism studies* (pp. 253–261). Routledge. https://doi.org/10.4324/9781315713793-26

Enkin, E. (2021). The role and purpose of Ombudsmen in a global media world. In S. J. A. Ward (Ed.), *Handbook of global media ethics* (pp. 107–121). Springer International Publishing. https://doi.org/10.1007/978-3-319-32103-5_7

Evers, H. (2012). The news ombudsman: Lightning rod or watchdog? *Central European Journal of Communication*, *5*(9), 224–242.

Fengler, S. (2008). Media journalism and the power of blogging citizens. In T. von Krogh (Ed.), *Media accountability today... and tomorrow: Updating the concept in theory and practice* (pp. 61–67). Nordicom; University of Gothenburg.

Fengler, S. (2019). Accountability in journalism. In J. F. Nussbaum (Ed.), *Oxford research encyclopedia of communication*. Oxford University Press. https://doi.org/10.1093/acrefore/9780190228613.013.772

Fengler, S., Eberwein, T., Karmasin, M., Barthel, S., & Speck, D. (2021). Media accountability: A global perspective. In S. Fengler, T. Eberwein, & M. Karmasin (Eds.), *The global handbook of media accountability* (1st ed., pp. 3–57). Routledge. https://doi.org/10.4324/9780429326943-2

Fengler, S., Eberwein, T., & Leppik-Bork, T. (2011). Mapping media accountability – In Europe and beyond. In T. Eberwein, S. Fengler, E. Lauk, & T. Leppik-Bork (Eds.), *Mapping media accountability – In Europe and beyond* (pp. 7–21). Herbert von Halem Verlag.

Fengler, S., Eberwein, T., Mazzoleni, G., Porlezza, C., & Russ-Mohl, S. (2014). Summary: Perspectives for newsrooms, policy-makers and journalism educators. In S. Fengler, T. Eberwein, G. Mazzoleni, C. Porlezza, & S. Russ-Mohl (Eds.), *Journalists and media accountability. An international study of news people in the digital age* (pp. 265–289). Peter Lang.

Fengler, S., & Speck, D. (2019). Journalism and transparency: A mass communications perspective. In S. Berger & D. Owetschkin (Eds.), *Contested transparencies, social movements and the public sphere: Multi-disciplinary perspectives* (pp. 119–149). Springer International Publishing. https://doi.org/10.1007/978-3-030-23949-7_6

Fidalgo, J. (2009). *O lugar da ética e da auto-regulação na identidade profissional dos jornalistas*. Fundação Calouste Gulbenkian.

García-Avilés, J. A. (2019). Examining media accountability in online media and the role of active audiences: The case of Spain. In T. Eberwein, S. Fengler, & M. Karmasin (Eds.), *Media accountability in the era of post-truth politics* (pp. 270–284). Routledge.

Groenhart, H. (2012). Users' perception of media accountability. *Central European Journal of Communication*, *5*(09), 190–203.

Heikkilä, H., Domingo, D., Pies, J., Glowacki, M., Kus, M., & Baisnée, O. (2012). Media accountability goes online: A transnational study on emerging practices and innovations (No. 14/2012). MediaACT.

Jacobsson, A., & Jacobsson, E.-M. (2010). Quality of the news. In W. Donsbach (Ed.), *The international encyclopedia of communication* (pp. 4060–4064). John Wiley & Sons. https://doi.org/10.1002/9781405186407.wbiecq002

Karlsson, M., Clerwall, C., & Nord, L. (2017). Do not stand corrected: Transparency and users' attitudes to inaccurate news and corrections in online journalism. *Journalism & Mass Communication Quarterly*, *94*(1), 148–167. https://doi.org/10.1177/1077699016654680

Koliska, M. (2015). *Transparency and trust in journalism: An examination of values, practices and effects* [Doctoral dissertation, University of Maryland]. DRUM - Digital Repository at the University of Maryland. https://doi.org/10.13016/M2635F

Ksiazek, T. B., & Springer, N. (2020). *User comments and moderation in digital journalism: Disruptive engagement* (1st ed.). Routledge. https://doi.org/10.4324/9780429276132

Lei n.º 1/99, de 13 de janeiro, Diário da República n.º 10/1999, Série I-A de 1999-01-13. (1999). https://diariodarepublica.pt/dr/detalhe/lei/1-1999-196219

Lei n.º 2/99, Diário da República n.º 10/1999, Série I-A de 1999-01-13. (1999). https://diariodarepublica.pt/dr/legislacao-consolidada/lei/1999-34439075-43455675

Lei n.º 78/2015, Diário da República n.º 146, Série I, de 29-07-2015 (2015). https://www.pgdlisboa.pt/leis/lei_mostra_articulado.php?nid=2455&tabela=leis&ficha=1&pagina=1&so_miolo=

Livro de estilo. (n.d.). Público. http://static.publico.pt/nos/livro_estilo/index.html

Martins, F. (2019, July 30). *«Expresso» aprova código de conduta para jornalistas usarem as redes sociais*. MAGG. https://magg.sapo.pt/atualidade/atualidade-nacional/artigos/expresso-aprova-codigo-de-conduta-para-jornalistas-usarem-as-redes-sociais

Mauri-Ríos, M., & Ramon-Vegas, X. (2015). Nuevos sistemas de rendición de cuentas de la información periodística. Exploración del escenario online español. *El Profesional de la Información*, *24*(4), Artigo 4. https://doi.org/10.3145/epi.2015.jul.04

Mauri-Rios, M., Ramon-Vegas, X., Rodríguez-Martínez, R., & Díaz-Campo, J. (2022). Indicadores para evaluar la rendición de cuentas en los medios de comunicación. *Cuadernos.info*, *51*, 1–27. https://doi.org/10.7764/cdi.51.27331

McQuail, D. (1997). Accountability of media to society: Principles and means. *European Journal of Communication*, *12*(4), 511–529. https://doi.org/10.1177/0267323197012004004

McQuail, D. (2003). *Media accountability and freedom of publication*. Oxford University Press.

McQuail, D., & Deuze, M. (2020). *Mcquail's media and mass communication theory* (7th ed). SAGE.

Meier, K. (2019). Quality in journalism. In T. P. Vos, F. Hanusch, D. Dimitrakopoulou, M. Geertsema-Sligh, & A. Sehl (Eds.), *The international encyclopedia of journalism studies* (pp. 1–8). Wiley. https://doi.org/10.1002/9781118841570.iejs0041

Meier, K., & Reimer, J. (2011). Transparenz im Journalismus: Instrumente, Konfliktpotentiale, Wirkung. *Publizistik*, *56*(2), 133–155. https://doi.org/10.1007/s11616-011-0116-7

Miranda, J. (2019). *O papel dos jornalistas na regulação da informação: Caraterização socioprofissional, accountability e modelos de regulação em Portugal e na Europa* [Doctoral dissertation, Universidade de Coimbra]. Estudo Geral – Repositório científico da UC. https://hdl.handle.net/10316/87571

Miranda, J. (in press). Digital media accountability and transparency instruments: An exploratory approach to the Portuguese context. In E. G. Torres & I. Amaral (Eds.), *Journalism today: Critical issues in media ethics*. McGraw-Hill.

Miranda, J., & Camponez, C. (2022, December 5–6). *"Mandated" accountability and transparency of the media: Subsidies from the Portuguese experience* [Conference presentation]. International conference "Captured Media: Researching Media Systems in and after Transitions", Lisbon, Portugal.

Molyneux, L., & Coddington, M. (2020). Aggregation, clickbait and their effect on perceptions of journalistic credibility and quality. *Journalism Practice*, *14*(4), 429–446. https://doi.org/10.1080/17512786.2019.1628658

Moutinho, N., Lima, H., Cavaco, S., & Reis, A. I. (2018). Portugal: Many structures, little accountability. In T. Eberwein, S. Fengler, & M. Karmasin (Eds.), *The European handbook of media accountability* (pp. 197–206). Routledge.

Neuberger, C. (2014). The journalistic quality of internet formats and services: Results of a user survey. *Digital Journalism*, *2*(3), 419–433. https://doi.org/10.1080/21670811.2014.892742

Newman, N., Fletcher, R., Robertson, C. T., Eddy, K., & Nielsen, R. K. (2022). *Reuters Institute digital news report 2022*. Reuters Institute for the Study of Journalism. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2022-06/Digital_News-Report_2022.pdf

O novo Clube Expresso: O que é, para quem, ao que vem? E como pode fazer para entrar? (2023, March 2). *Expresso*. https://expresso.pt/clube-expresso/2023-03-02-O-novo-Clube-Expresso-o-que-e-para-quem-ao-que-vem--E-como-pode-fazer-para-entrar--28b9007c

Pérez-Díaz, P.-L., Zamora Medina, R., & Arroyas Langa, E. (2020). Between self-regulation and participatory monitoring: Comparing digital news media accountability practices in Spain. *Media and Communication*, *8*(2), 112–123. https://doi.org/10.17645/mac.v8i2.2721

Plaisance, P. L. (2000). The concept of media accountability reconsidered. *Journal of Mass Media Ethics*, *15*(4), 257–268. https://doi.org/10.1207/S15327728JMME1504_5

Plaisance, P. L. (2016). Journalism ethics. In J. F. Nussbaum (Ed.), *Oxford research encyclopedia of communication* (pp. 1–18). https://doi.org/10.1093/acrefore/9780190228613.013.89

Porlezza, C. (2019). From participatory culture to participatory fatigue: The problem with the public. *Social Media + Society*, *5*(3), 1–4. https://doi.org/10.1177/2056305119856684

Política de correção. (n.d.). Observador. Retrieved March 30, 2023, from https://observador.pt/politica-de-correcoes/

Prochazka, F., & Obermaier, M. (2022). Trust through transparency? How journalistic reactions to media-critical user comments affect quality perceptions and behavior intentions. *Digital Journalism*, *10*(3), 452–472. https://doi.org/10.1080/21670811.2021.2017316

O que é o provedor do leitor. (n.d.). *Público*. https://www.publico.pt/cronicas-provedor/sobre

Ramon, X., Mauri-Ríos, M., & Díaz-Campo, J. (2020). Instrumentos de rendición de cuentas impulsados por los medios de comunicación: Percepción de los periodistas y ciudadanos españoles. *Revista de Comunicación*, *19*(1), 221–241. https://doi.org/10.26441/RC19.1-2020-A13

Regras da comunidade—As regras dos comentários. (n.d.). Observador. https://observador.pt/regras-da-comunidade/

Reich, Z. (2011). User comments: The transformation of participatory space. In J. B. Singer, A. Hermida, D. Domingo, A. Heinonen, S. Paulussen, T. Quandt, Z. Reich, & M. Vujnovic (Eds.), *Participatory journalism* (pp. 96–117). Wiley-Blackwell. https://doi.org/10.1002/9781444340747.ch6

Renedo-Farpón, C., Canavilhas, J., & Díez-Garrido, M. (2022). Transparency mechanisms in the media: Analysis of Spain and Portugal. *El Profesional de la Información*, *32*(1), e320105. https://doi.org/10.3145/epi.2023.ene.05

Saltzis, K. (2012). Breaking news online. *Journalism Practice*, *6*(5–6), 702–710. https://doi.org/10.1080/17512786.2012.667274

Schwaiger, L., Vogler, D., & Eisenegger, M. (2022). Change in news access, change in expectations? How young social media users in Switzerland evaluate the functions and quality of news. *The International Journal of Press/Politics*, *27*(3), 609–628. https://doi.org/10.1177/19401612211072787

Shanahan, M. K. (2017). *Journalism, online comments, and the future of public discourse* (1st ed.). Routledge. https://doi.org/10.4324/9781315209579

Suárez-Villegas, J., Rodríguez-Martínez, R., Mauri-Ríos, M., & López-Meri, A. (2017). Accountability y culturas periodísticas en España. Impacto y propuesta de buenas prácticas en los medios de comunicación españoles (MediaACES). *Revista Latina de Comunicación Social*, *71*, 321–330. https://doi.org/10.4185/RLCS-2017-1167

Urban, J., & Schweiger, W. (2014). News quality from the recipients' perspective: Investigating recipients' ability to judge the normative quality of news. *Journalism Studies*, *15*(6), 821–840. https://doi.org/10.1080/1461670X.2013.856670

van der Wurff, R., & Schönbach, K. (2014). Audience expectations of media accountability in the Netherlands. *Journalism Studies*, *15*(2), 121–137. https://doi.org/10.1080/1461670X.2013.801679

von Krogh, T. (2008). Introduction. In T. von Krogh (Ed.), *Media accountability today... and tomorrow: Updating the concept in theory and practice* (pp. 9–28). Nordicom; University of Gothenburg.

Waisbord, S. (2020). Mob censorship: Online harassment of US journalists in times of digital hate and populism. *Digital Journalism*, *8*(8), 1030–1046. https://doi.org/10.1080/21670811.2020.1818111

Ward, S. J. (2014). The magical concept of transparency. In L. Zion & D. Craig (Eds.), *Ethics for digital journalists: Emerging best practices* (pp. 45–58). Routledge.

Ward, S. J., & Wasserman, H. (2015). Open ethics. *Journalism Studies*, *16*(6), 834–849. https://doi.org/10.1080/1461670X.2014.950882

Zamith, F. (2015). Em busca de uma certificação de qualidade do ciberjornalismo. *Media & Jornalismo*, Special Issue, 73–92.

Biographical Note

João Miranda is an assistant professor at the Faculty of Arts and Humanities of the University of Coimbra and a researcher at the Centre for Interdisciplinary Studies — CEIS20. In 2019, he defended his doctoral thesis, *O Papel dos Jornalistas na Regulação da Informação: Caraterização Socioprofissional, Accountability e Modelos de Regulação em Portugal e na Europa* (The Role of Journalists in Information Regulation: Socioprofessional Characterisation, Accountability and Regulation Models in Portugal and Europe).

ORCID: https://orcid.org/0000-0002-4720-3724
Email: jmiranda@uc.pt
Address: Centro de Estudos Interdisciplinares — CEIS20 da Universidade de Coimbra | Rua Filipe Simões n.º 33 | 3000-457 Coimbra

Submitted: 15/04/2023 | Accepted: 24/10/2023

Comunicação e Sociedade, vol. 44, 2023, e023023
https://doi.org/10.17231/comsoc.44(2023).4736

The Strategic Approach to Quality in Journalism: Innovation, Technology and Applied Research

Josenildo Luiz Guerra
Departamento de Comunicação Social, Centro de Educação e Ciências Humanas, Universidade Federal de Sergipe, Sergipe, Brazil

Abstract

This article addresses the quality of journalism from a strategic perspective (Paladini, 2005), according to which quality is an organisational effort that integrates external conditions and demands with internal actions, from planning to final product delivery. In order to implement this perspective, it will be necessary to think about quality in journalism beyond the concept mainly focussed on product evaluation towards a concept based on the development of quality management systems (QMS). The QMS is a set of integrated actions that aligns assessment with editorial management guidelines, production processes and products. The implementation of this proposal requires investment in innovation in two complementary movements to develop: (a) a QMS for journalistic organisations, which contains assessment methods with metrics for outcomes and editorial management models, processes and products that incorporate the assessment methods and their metrics; and (b) computerised systems capable of enabling the implementation of the QMS using the technological resources available, in terms of structured journalism, exploiting the potential of digital journalism in databases. The strategic approach to quality in journalism is not attainable with the know-how currently available in the sector. Investment in applied research and experimental development in journalism is crucial to fostering editorial and technological innovation to produce the transformation required to craft a new journalistic intelligence that bolsters credibility with quantifiable editorial quality data and ensures the sector's long-term sustainability.

Keywords
quality in journalism, quality management system, technology, innovation, applied research

A Abordagem Estratégica da Qualidade em Jornalismo: Inovação, Tecnologia e Pesquisa Aplicada

Resumo

O presente artigo aborda o tema da qualidade em jornalismo a partir de uma perspectiva estratégica (Paladini, 2005), segundo a qual a qualidade é um esforço organizacional que considera condições e demandas do cenário externo articuladas com as ações internas, desde o planejamento até a entrega do produto final. Para implementar essa perspectiva, será necessário pensar a qualidade em jornalismo para além da concepção majoritariamente focada na avaliação do produto, para a concepção baseada no desenvolvimento de sistemas de gestão da qualidade (SGQ). O SGQ é um conjunto de ações integradas, que alinha a avaliação a diretrizes da gestão editorial, processos de produção e produtos. A implementação dessa proposta requer o investimento em inovação, em dois movimentos complementares, para desenvolver: (a) um SGQ para organizações jornalísticas, que contenha métodos de avaliação com métricas para mensuração de resultados e modelos de gestão editorial, processos e produtos que incorporem os métodos de avaliação e suas métricas; e (b) sistemas informatizados capazes de permitirem a operacionalização do SGQ, através dos recursos tecnológicos disponíveis nos termos do jornalismo estruturado, que explora as potencialidades inscritas no jornalismo digital em base de dados. A abordagem estratégica da qualidade em jornalismo não se viabiliza com o *know-how* disponível hoje no setor. O investimento em pesquisa aplicada e no desenvolvimento experimental em jornalismo será fundamental para gerar inovação editorial e tecnológica, a fim de operar a transformação requerida para a construção de uma nova inteligência jornalística, capaz de elevar a credibilidade, com dados de qualidade editorial monitoráveis e demonstráveis, e garantir a sustentabilidade do setor, no longo prazo.

Palavras-chave
qualidade em jornalismo, sistema de gestão da qualidade, tecnologia, inovação, pesquisa aplicada

1. Introduction

The technological transformations affecting the global media sector have profoundly impacted journalism. To a greater or lesser extent, those changes threaten the business sustainability and the credibility of the journalistic institution[1] and its organisations as reliable sources of information (Anderson et al., 2012). Specifically regarding quality, two examples underscore the urgency for journalistic institutions to respond to this challenging landscape that jeopardises their credibility. Recent surveys conducted by the Reuters Institute have shown a consistent decline from 2015 to 2022 in the percentage of people who trust most of the news they consume across several countries surveyed (Newman et al., 2022). Equally recent, quality assessment studies (Guerra, 2020; Rothberg & Garrido, 2019; Träsel et al., 2019) indicate an incipient adoption of good editorial practices in requirements directly linked to credibility. This sets a critical scenario for the business model, currently associated with a low perception of quality among audiences and modest outcomes in the assessment processes implemented.

Specifically in the case of online media, the potential of which is the subject of this work, Morales-Vargas et al. (2022) emphasise the pressing need for rigorous and reliable journalism amid the current widespread dissemination of fake news. However, their extensive review of quality indicators in this domain revealed a notable gap, specifically in assessing reliability indicators. Considering the convergence landscape (technological, entrepreneurial, professional and communicative) described by Salaverría (2003), this study seeks to associate editorial quality efforts, in which trust requirements stand out, with resources specific to online media, such as those associated with digital journalism in databases (DJDB), which underpins the entire journalistic production environment. The goal is to merge both sets of indicators, those based on media characteristics (Palacios, 2011) and those focused on content reliability, to create more comprehensive assessment tools.

[1] The term "journalistic institution" refers to the collective knowledge and interested parties (professionals, organisations and society) interlinked to form the entity recognised as "journalism". A "journalistic organisation" represents a specific group of individuals and resources actively applying professional expertise to practice journalism.

This study is based on the premise that quality is a distinctive element (Fengler et al., 2014; Meyer, 2004/2007), not only among news organisations that seriously embrace the subject compared to others that ignore it but also among new competitors, such as social media. An editorial quality policy consists of demonstrating virtues worthy of earning public trust.

However, implementing the quality agenda is only part of the effort, which should be coupled with a proposed set of solutions designed to elevate journalism to a higher standard of professional proficiency. In order to develop this proposition, this article adopts a methodological structure grounded in applied research and experimental development, the basic foundations of which will be presented before revisiting the underlying theme of quality and its implications.

The proposed movement entails rethinking quality management to harmonise innovation in editorial management, production processes and products with technological innovation. Innovation should be understood as "a new or improved product or process (or a combination thereof) that differs significantly from the unit's previous products or processes and that has been made available to potential users (product) or brought into use by the unit (process)" (Organisation for Economic Co-operation and Development, 2018, p. 32). Embracing innovation becomes imperative to meet more rigorous quality standards.

This approach requires universities and organisations to invest in applied research, a type of research directed primarily "towards a specific, practical aim" (Organisation for Economic Co-operation and Development, 2015, p. 51). Applied research outcomes are intended primarily to be valid for possible applications "to products, operations, methods or systems" (p. 51), which become the object of experimental development,

> systematic work, drawing on knowledge gained from research and practical experience and producing additional knowledge, which is directed to producing new products or processes or to improving existing products or processes. (Organisation for Economic Co-Operation and Development, 2015, p. 51)

Based on this understanding, the history of research within the scope of the research programme in quality, innovation and technology applied to journalism has systematised an applied research method in journalism[2]. It encompasses various theoretical and methodological elements focused on understanding how journalism is *done* in order to intervene in it with a scientific approach. It aligns theoretical perspectives with professional *practices*, developing the foundations and conceptual developments to address the normative, technical, and procedural aspects that shape the activity.

The process begins with an initial understanding of what journalism is, from which problems are formulated, and the applied effort of conceptual and methodological

[2] To explore further insights and references on applied research in journalism, consider works by Meditsch and Moreno (2004), Franciscato (2006), and Machado and Sant'Ana (2014). The description of the concept and method of applied research in this article echoes fundamental aspects and passages developed in other articles, such as Guerra (2016).

systematisation seeks to offer an innovative solution. Initially conceptual, this solution might evolve into an experimental development phase, transforming into a framework meant for practical implementation, subject to testing, adjustments, and revisions to validate its efficacy in solving the problem it was designed to solve.

Applied research in journalism is guided by two key principles: the purpose principle and the complementarity principle. The purpose principle organises the responsibilities the journalistic institution proposes or is asked to accomplish in society through agreements and conventions established among interested parties, incorporating quality requirements pursued by journalistic organisations. The complementarity principle determines the acknowledgement of various axes that, although addressing distinct and specific issues, converge in a particular configuration to impart meaning and effectiveness to the purpose principle. The integration among these axes demonstrates coherence between the formulation of the problem, the proposed solution and the various types of knowledge used to implement it.

The six axes of the complementarity principle are defined in Table 1 and broken down according to their application in this article.

Axis of the complementarity principle	Application
Theory	Theoretical and methodological foundations outlined in the literature review, in the proposal for a strategic approach to quality in journalism, the definition of a quality management system (QMS) and the connections suggested between editorial fundamentals and technological resources, such as the concepts of “digital journalism in databases” and “structured journalism”
Ethics	The primary and secondary requirements proposed (which we will discuss later) derive from fundamental ethical values inherent in democratic societies aligned with foundational concepts shaping both the problem and the proposed solutions
Technique	The technical procedures have yet to be developed as they are contingent upon the editorial and technological decisions stemming from the proposed solutions. Advancement in this axis hinges on consolidating the conceptual understanding of the strategic approach to quality in journalism and the QMS
Processes	The process is envisioned as a production domain defined by parameters set by editorial management guidelines and standardised requirements outlined by the QMS. Moreover, this process is connected to technological advancements in software development to manage and implement its actions and measurements concerning quality
Technology	Technology is an essential resource in editorial management, whose functionalities can facilitate both the quality-oriented management of processes and the measurement of indicators demonstrating the organisation’s attained quality levels
Sustainability	Sustainability is not directly developed, as there are no analyses concerning the investment and potential return of the QMS proposal and its developments. From the point of view of the journalistic business model, quality management can elevate both the product quality and the interested parties’ perception of quality, which contributes to bolstering credibility over the medium to long term, thereby offering a competitive edge in the market

Table 1. *Axis of the complementarity principle related to the problem and solutions developed in this proposal*

This work addresses the prevalent problem in contemporary journalism, wherein the existing model lacks the mechanisms within its processes and products to plan and demonstrate its effectiveness in delivering credible content. Mere declarations of commitment to quality are insufficient unless accompanied by measurable outcomes demonstrating its excellence. If this situation prevails, there will be no reaction to the loss of trust and no proactive action to strengthen it.

The proposed solution unfolds in two steps:

1. Conceptual design of a quality management system (QMS) aimed at planning, implementing and assessing quality in journalistic organisations. It aims to simultaneously and complementarily steer production towards quality, consistently assess outcomes to correct flaws and seek continuous improvement in journalistic production. Beyond addressing failures, the overarching goal of the "system" is to attain editorial quality and showcase its positive outcomes in order to give society and other interested parties reasons to trust its products;

2. The second movement outlines a roadmap for applied research and experimental development essential for implementing the proposed conceptual QMS, seamlessly combining editorial and technological solutions.

Given the effort to articulate quality with innovation, technology and applied research, the text endeavours to make basic connections and concepts to support this movement. As such, it intentionally omits certain details due to space constraints. This proposal will unfold across three sections. The first, a brief literature review, explores (a) points of convergence between quality requirements across different works and (b) the alignment of approaches to the different components of a QMS. The direction in the previous topic will underpin the second topic, the strategic approach to quality in journalism (SAQJ), which shapes the contours of the proposed solution, delineating a conceptual QMS applied to journalistic organisations. The third topic argues that the QMS concept requires applied research and experimental development to generate the editorial and technological innovation needed to implement it. These solutions require innovative editorial and technological competencies, which can form the groundwork for a new journalistic intelligence.

2. Grounds for a Strategic Perspective on Quality in Journalism

The acknowledgement that studies on journalism quality encompass diverse approaches, assessment parameters, and evaluation methods is evident (Santos & Guazina, 2020). Nevertheless, amidst this diversity, there is a recognition that various theories and methods face shared challenges. Considering the urgency of this issue for the future of journalism, there is a call to identify convergence points that will allow the academic community, organisations and professionals to advance with enhanced systematisation and deeper insights into the subject matter.

Within its original realm, administration, quality assessment seeks to measure the levels of suitability of products to the organisation's internal standards and consumer expectations, encompassing their perceived quality (Berry & Parasuraman, 1991, as cited in Slack et al., 1997/2007; Chiavenato, 2007). This endeavour includes various approaches based on intrinsic (transcendental) excellence, the product, the user, production or value (Garvin, 1987, as cited in Carvalho, 2005). However, a perception of quality as a strategic investment for organisations has overtaken specific approaches to quality.

The strategic approach to quality must consider "broad scenarios that extend beyond the organisation itself", encompassing the entire "external area in which it operates" (Paladini, 2005, p. 26). This includes suppliers, customers, markets, and competitors, among others, without excluding the tactical and operational management levels. Pursuing quality is a guiding principle in organisational action, harmonising internal and external factors to ensure public recognition and the organisation's long-term sustainability.

Embracing quality as an operating principle within an organisation requires a management model that translates this principle into reality. For instance, the quality standards of the International Organization for Standardization, whose requirements "are generic and are intended to be applicable to any organisation, regardless of its type or size, or the products and services it provides" (Associação Brasileira de Normas Técnicas, 2015b, p. 1). These standards propose an approach to conceiving and managing quality that is considered the most effective and can be applied to journalism (Swanepoel, 2012; Torre & Téramo, 2007).

The challenge is not merely adopting these references but adapting them to a specific model for journalistic organisations, especially due to a lack of knowledge within journalism regarding management, processes, and assessment tools ingrained in the professional and organisational culture. Overcoming this gap is crucial for strategic quality management.

Fundamental principles outlined by the Brazilian Association of Technical Standards (Associação Brasileira de Normas Técnicas, 2015b, p. 1) will serve as guiding pillars in addressing this challenge and constructing the proposed model. The goal is to demonstrate, in two movements, significant indicators of alignment pointing to the viability of this endeavour: firstly, delineating quality assessment requirements in journalism; secondly, assessing the suitability of the various studies, to varying degrees, with pertinent aspects underpinning the SAQJ proposal advocated here.

2.1. Quality Requirements in Journalism: Points of Convergence

Quality refers to the extent to which a product meets requirements — stipulated needs and/or expectations, explicitly stated or implied — which "can be generated by different interested parties or by the organisation itself" (Associação Brasileira de Normas Técnicas, 2015a, p. 21). Requirements are fundamental because they establish benchmarks against which quality is assessed. Within studies focusing on quality in journalism, there is a diversity that needs to be equated in order to build basic consensus.

This study draws on Santos and Guazina (2020) and Chistofoletti (2010) to illustrate the convergence between different propositions. Santos and Guazina (2020) conducted a survey encompassing North American, European, and Latin American studies, and their analysis mapped the diversity of perspectives on the topic. Chistofoletti (2010) compiled a list based on interviews with 22 editorial managers from Brazilian companies. Table 2 outlines the requirements they explored, categorised here into affinity groups based on their initial research.

Affinity groups	Requirements	Number
Group 1. Emphasis on independence	Acting without government interference; independent; independence; non-partisanship; economic independence; editorial independence	6
Group 2. Emphasis on impartiality and balance	Impartiality (three references); diversity; equity; proportionality; balanced and fair information, reporting alternative perspectives and interpretations in a non-sensationalised and impartial way; plurality (two references); evidence of integrity (fairness, balance or independence)	10
Group 3. Emphasis on demands of democratic societies	Participatory democracy; contributing to an informed society or media truth; providing the basis for democratic decision-making processes; public interest; social concern; alertness to risks; social relevance; comprehensive offer of relevant news and general information about events in society and the world around it	8
Group 4. Emphasis on truth	Accuracy (three references); investigation (two references); depth of investigation; the best version of the truth; objectivity (two references); rigour of reporting; objective information, in the sense of being factual in form, accurate, honest, sufficiently complete and true to reality; reliable, in the sense of being verifiable in fact of opinion; clean, noiseless reporting; zero error rate; good reporting; information and not opinion; reliability; correctness	18
Group 5. Emphasis on relevance	Relevance; social relevance; informative zeal or relevance; prioritisation and the relationship between contents; geographical and emotional proximity of the information; novelty; originality of the subject; meeting the public's daily information needs	8
Group 6. Emphasis on product	Content of stories; quality of writing; clarity of story; clarity of style; pleasing presentation; quality of presentation; simplicity	7
Group 7. Emphasis on staff profile	Diverse staff; courageous; expand educated audience; desire to influence opinion leaders; specialised staff	5
Group 8. Diversity and connection to purpose	Protection from propaganda and irrational appeals; desire to help; absence of sensationalism; service to the reader; responsibility; social responsibility; commitment to the community; context; loyalty; ethics; criticism; alignment with the public; usefulness to the reader	13
Group 9. Miscellaneous, connection with product characteristics	Quality of analysis; attention to context; good stories and interesting characters; elements that allow the facts to be interpreted; journalistic scoop; interpretation of reality and going beyond the facts; speed; novelty; differentiated approaches; breadth; credibility; efficiency; selection of existing and reliable facts and sources; the sources; the choice of agenda	15

Table 2. *Overview of journalistic quality requirements*

Note. Based on a literature review by Santos and Guazina (2020) and Christofoletti (2010)

The survey indicates dispersion due to terminological variation among requirements, yet it also highlights potential convergence when grouped by affinity.

2.2. Points of Convergence Among Journalism Studies on Quality and the Quality Management System

Attaining quality requires a QMS, the set of activities through which an organisation identifies its objectives and determines the processes and resources needed to attain the desired outcomes. Journalism studies considered individually explore, to some extent, aspects relevant to what a QMS requires. However, they do not constitute a system because they do not encompass a "set of interrelated or interacting elements" (Associação Brasileira de Normas Técnicas, 2015a, p. 19).

Following, we will outline the seven components of a QMS according to the Brazilian Association of Technical Standards (Associação Brasileira de Normas Técnicas, 2015b) standard, linking them to various types of quality research produced in journalism studies. This comparison aims to illustrate how these research types, while not directly aligned with the standard, resonate with the concepts it encompasses.

Context of the organisation: *definition of external and internal issues relevant to the organisation's strategic direction, which impact its ability to achieve outcomes considering the expectations and needs of interested parties*. Studies on quality in journalism delve into the origin of requirements segmented by interested parties, falling into two groups. One group focuses on identifying actors directly involved in the production, such as journalists, organisations, academia, the audience and their respective demands for quality (Lacy & Rosenstiel, 2015; Vehkoo, 2009/2010). This group includes pressures from political and economic actors, for example, as highlighted by Odriozola-Chéné et al. (2019), based on interviews with Latin American journalists, who express concerns about their editorial autonomy being compromised by interference in their routines, impacting the quality of their work. The other group addresses macro-interested parties, including the market, legal system, media system and the public, along with their demands concerning journalistic products (Bertrand, 1999/2002; Fengler et al., 2014; McQuail, 2003, 2013; Mompart & Sampio, 2013; Pinto & Marinho, 2003). This approach involves mapping interested parties capable of proposing quality requirements to guide the work of organisations. However, the requirements stemming from these segments are often depicted as conflicting or competitive. In this sense, assessing quality from one perspective could compromise it from another. As a rule, each perspective has its unique approach, which may diverge or converge with other perspectives. The SAQJ aims to make these requirements converge as much as possible.

Leadership: *establishing purposes, commitments and responsibilities, expressed in the quality policy, focusing on the customer and interested parties*. Torre and Téramo (2007) state that adopting a QMS should be a decision by the top management of news organisations. Initiatives such as *The Trust Project* (2023), *Journalism Trust Initiative* (Reporters Without Borders, 2021) and *News Guard* (2023) have been developed to assess organisations' commitment to practices and values that increase their credibility. All these initiatives' indicators rely on the leadership's decision within an organisation to adopt them. In other words, by analysing the availability of the required tools, these studies assess not just the mere existence of these instruments but the commitment of organisational leaders toward their adoption.

Planning: *includes preceding elements to ensure that the QMS achieves its outcomes, prevents and avoids adverse effects and fosters improvement*. This group encompasses studies suggesting the evaluation of editorial planning documents, such as writing and style manuals, editorial projects, and charters of principles, among others, which provide operational guidelines for journalistic organisations. Examples include works by Rothberg and Garrido (2019), Guerra (2010), Christofoletti (2010) and Swanepoel (2012).

Support: *ensuring the resources, people, infrastructure, environment, monitoring, measurement, and more for implementing the QMS*. This item is explored in works such as that proposed by the labour index (Pablo & Mateos, 2004, as cited in Mompart & Sampio, 2013), which assesses indicators concerning working conditions provided to professionals or when assessing, for example, the training processes offered by organisations to their staff. The journalists interviewed by Odriozola-Chéné et al. (2019) highlighted that the lack of material resources, leading to insufficient time, tools and even compromised salaries, also impacts the attainment of minimum quality standards.

Operation: *operational planning and control for product provision, requirement determination, customer communication, critical analysis, product design and development, and related aspects*. It involves works directly or indirectly targeting the production process, from the selection of information to its public dissemination. Gordillo et al. (2013), for example, explain that the Journalistic Added Value method distinguishes processes from journalistic products and establishes that it is possible to analyse the process based on the published product (Pellegrini, 2011, as cited in Gordillo et al., 2013). The research that best focuses on processes is newsmaking studies. However, they do not aim to assess quality, as they use methods that involve becoming deeply embedded within the organisation to understand the production process internally.

Performance evaluation: *encompasses monitoring, measurement, methods, analysis and evaluation, including the treatment of outcomes*. It is the most developed item in work on quality in journalism, and it covers three primary areas: requirements (as previously discussed in Section 2.1), the object, and the evaluation method, all detailed below. *Regarding the object*, evaluation objects can be distinguished between product and package. The former denotes the specific information unit (a news article), and the latter encapsulates a set of information units (a programme or edition). These units exhibit content characteristics (the information) and characteristics related to drafting and style (the message). There are various classifications, including those by van Cuilemberg (2000, as cited in Lacy & Rosenstiel, 2015), Rosengren et al. (1996) and the "journalistic index" (Pablos & Mateos, 2004, as cited in Mompart & Sampio, 2013). *Regarding the methods*, Lacy and Rosenstiel (2015) systematised four methods: (a) product analysis, applied to assess political balance, variety of coverage, and sources, among others; (b) audience preferences, conducted through surveys; (c) expert judgement, involving surveys with experts, editors, professionals and professional awards; and (d) indirect indicators, such as financial outcomes, total news/team count; news per agency service; among others.

Improvement: *involves determining opportunities for improvement and implementing the actions needed to meet client requirements, encompassing corrective action and continuous improvement*. Contributions come in two forms within this context: direct and indirect. Direct, when assessments outline the desired requirements and encourage their adoption by those assessed, often offering some form of recognition or reward. For example, *The Trust Project* (2023), *Journalism Trust Initiative* (Reporters Without Borders, 2021) and *News Guard* (2023) award quality certifications to organisations meeting their indicators. Indirectly, by establishing indicators, every evaluation suggests to those being evaluated what constitutes a commendable journalistic product according to that evaluation method. However, unlike direct contributions, indirect ones lack a clear procedure for indicating these requirements, making it challenging for evaluated organisations to incorporate them effectively.

In summary, the brief analysis of the requirements shows how they converge towards potential consensus parameters despite the diversity of terms. Furthermore, the relationship between studies on quality in journalism and the components of a QMS reveals varying degrees of emphasis on complementary aspects when viewed from the strategic approach perspective.

3. Towards a Strategic Approach to Quality in Journalism

In strategic quality assessment, dealing exclusively with quality assessment is not enough. It is necessary to consider the QMS, the set of procedures to plan and implement quality in a given organisation. The assessment is just one facet among a spectrum of actions that must be strategically orchestrated and executed cohesively. Hence the notion of "system".

This topic aims to distil the guidelines outlined in the Brazilian Association of Technical Standards (Associação Brasileira de Normas Técnicas, 2015a) standard for QMS, offering a roadmap to address the specific demands within journalism.

Figure 1, mapping the external and internal contexts of the organisation, illustrates the intricate involvement of diverse QMS components within journalistic activities (Guerra, 2020).

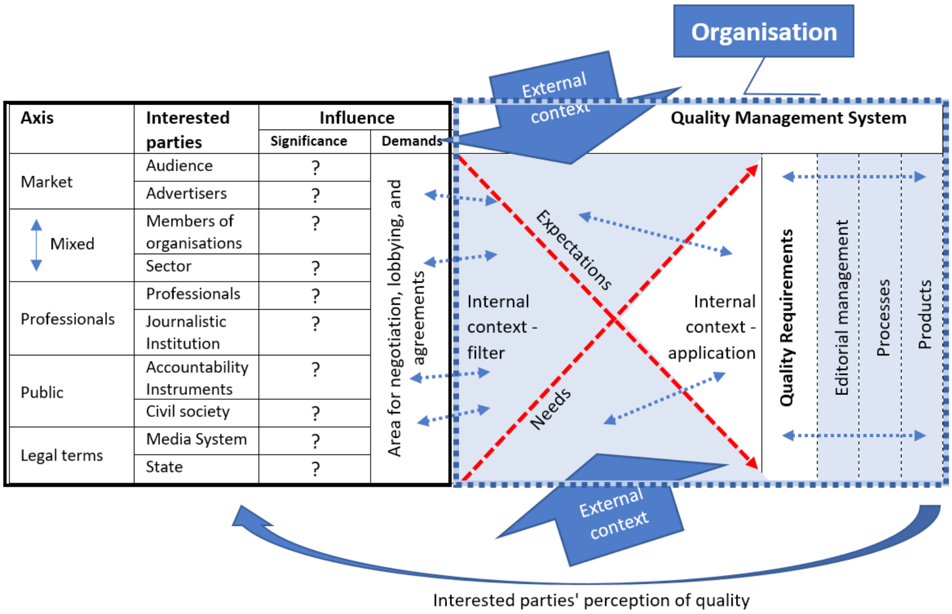

Figure 1. *Concise diagram outlining the interactions, interested parties, and organisational dynamics intended to form a quality management system applied to journalistic organisations*

Note. Created by the author. An earlier, slightly different version is available in Guerra (2020)

Context of the organisation: Figure 1 expresses the aspects that shape the organisation's context. It illustrates interested parties expressing their needs and expectations, with varying degrees of influence determined by economic and political prowess. Market dynamics typically wield significant influence due to their direct impact on an organisation's financial viability. In societies with media regulation systems, interested parties from the public and legal framework axes have strengths that can counterbalance the strength of the market axis compared to societies that do not have them. Organisations draw from this interaction the editorial requirements they deem viable to make up the product they want to offer their audience, the basis for their financial sustainability, while also meeting the demands of other interested parties, in whole or in part.

Leadership: leaders assume the responsibility of steering the negotiation process internally, using the filters they deem relevant, such as values, resources, and infrastructure, and applying them to define the requirements that should shape their journalistic product. Leaders also oversee QMS implementation and provide the operational means to consistently assess the alignment between production and the defined requirements.

Planning: organisations need to convert the requirements into products, processes and technical specifications, which should provide the references for operating the QMS, both to assess and to guide production. In Figure 1, planning is expressed by the "editorial management" field, encapsulating the requirements stemming from the negotiation process with interested parties. Manuals, editorial projects and similar documents are examples of planning already available in organisations. However, in many cases, they are insufficient because they do not incorporate instruments for evaluating the performance of the requirements they claim to follow.

Support: necessary to guarantee the means to implement planning actions, such as personnel, training, facilities and equipment, among others.

Operation: operation stands as the core activity within the organisation. In Figure 1 it is represented by the processes integral to executing editorial planning. This includes operational planning, editorial decision-making, executing production stages with their respective deliveries, and employing content production techniques (research, drafting and editing, for example), among other fundamental elements in journalistic production.

Performance evaluation: becomes integral in ensuring that the requirements outlined in editorial planning are upheld throughout the production cycle, ensuring the quality of the final output. It involves consistent evaluation mechanisms at each stage of production. For instance, from the outset, through the sources suggested, the level of diversity within a news story can be gauged, allowing for corrective interventions to balance any biases. In addition to the process, the organisation must regularly monitor whether the requirements established in the planning align with stakeholder demands and their perception of quality. A set of evaluation points becomes essential for the QMS to monitor quality, using pre-established indicators and methods, from the product's conception through its production to the degree of satisfaction of those who receive it.

Improvement: the evaluation identifies diverse flaws, necessitating interventions to improve the product. Some can be remedied with the existing know-how, while others require innovative solutions. Implementing a QMS requires innovation in management, processes and products, aligning common requirements among interested parties and convergent methods of execution and evaluation.

The design of a QMS applied to journalism requires clarity on the requirements to be employed, which should guide the entire editorial conception of the product, its production processes and its evaluation methods. Regarding the requirements, (a) although there is a diversity of forms of expression, as illustrated in Table 2, there are identifiable convergences; (b) they must express, to some extent, shared demands and expectations among different interested parties. Otherwise, their quality will not resonate with those whose requirements have not been partially addressed.

The following is a minimum set of requirements reasonably established both in the theoretical and professional field of journalism and aligned with the normative framework of democratic societies. They represent voluntary, assigned, or contracted responsibilities (McQuail, 2003), which bind the relationship between journalistic organisations and their various interested parties. Their minimal nature indicates a fundamental core that garners maximum consensus, from which it is possible to derive, in an aligned manner, complementary requirements to deal with the complexity of the journalistic production process.

The requirements are divided into primary and secondary. The primary requirements stem from the deliverables directly linked to journalism's most basic responsibility, as expressed by Kovach and Rosenstiel (2001): "to provide citizens with the information they need to be free and self-governing" (p. 17). In this sense, three essential requirements (truth, recentness and relevance) are crucial for journalistic information to connect individuals with facts, the present moment, and important issues for decision-making[3].

The secondary requirements stem from journalism's integration into a particular type of society, in this case, democratic societies. Despite the different democratic cultures and modes of institutionalisation that may shape specific journalistic demands (Anderson, 2014; Cristian, 2009; Strömbäck, 2005), a core of fundamental values can be used as a common reference. It is important to note that democratic societies acknowledge that journalism requires classic prerogatives that provide suitable conditions to fulfil its responsibilities and deliver the expected requirements (Table 3).

[3] Due to this text's scope, detailed development of these primary requirement concepts is not possible. For the concept of "truth", refer to Gomes (2009); for "recentness", see Franciscato (2005); for "relevance", refer to Guerra and Feitoza (2020).

Prerogatives	Requirements	
	Primary	Secondary
Freedom of expression (information, opinion and criticism) Freedom of the press or journalistic information Right to information Safety	Truth (Group 4) Relevance (Group 5) Recentness	Autonomy/independence: within democratic and professional parameters (Group 1) Public interest: prioritising the public over the private (Group 3) Respect for people's dignity: imposing limits on prerogative use (Group 3) Plurality and contradiction: addressing legitimate conflict situations (mediation; Group 2)

Table 3. *Set of prerogatives and primary and secondary requirements in democratic societies*

The primary and secondary requirements represent convergence points for developing new and essential requirements for the information (the content) and the message (the format). The controlled expansion of requirements ensures coherence and alignment, integrating them into a QMS to direct the entire journalistic production flow, as depicted in Figure 2. This process should establish editorial guidelines and specifications for processes and products aligned with the performance assessment parameters. Each organisation will incorporate these benchmarks to shape its unique editorial approach (for an example of how management guidelines unfold in journalistic production and quality assessment processes, refer to Swanepoel, 2012).

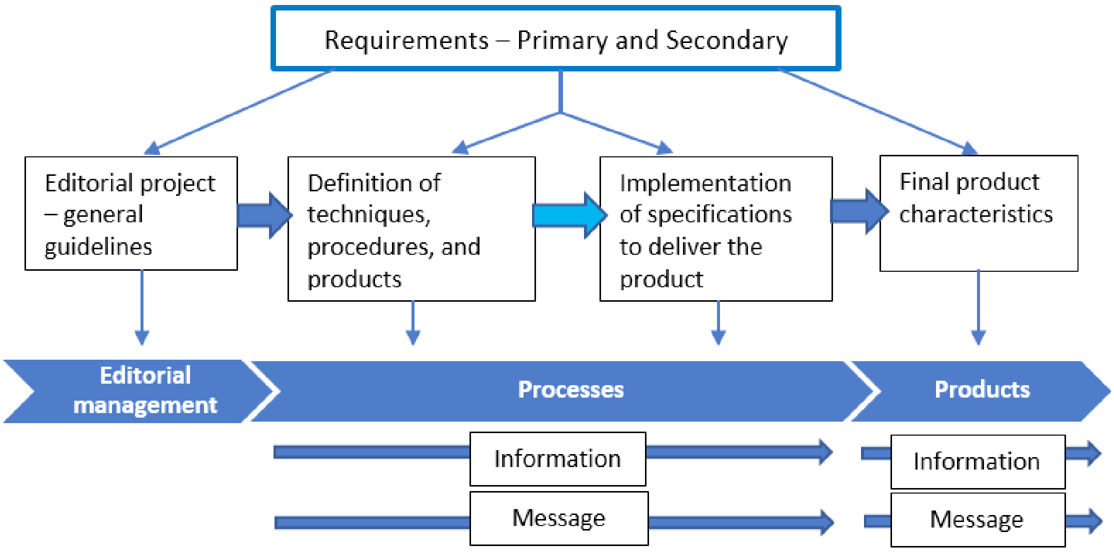

Figure 2. *Alignment of requirements to integrate the production process*

Once these guidelines have been outlined, specifying the structure of a QMS applied to journalism and the minimum requirements that should guide it, the next step involves analysing the challenges for its implementation in journalistic organisations. This requires a coordinated effort between editorial conception, ensuring parameter alignment (Figure 2), and technology to guarantee its implementation (Figure 3).

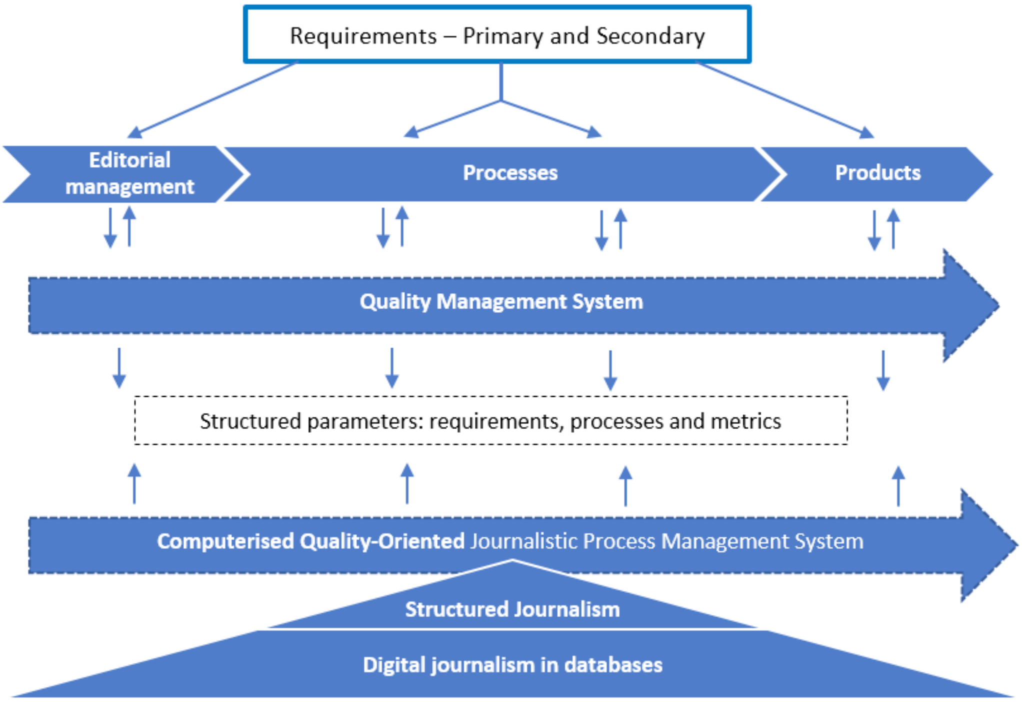

Figure 3. *Structured requirements for a quality management system generate parameters for a computerised editorial production management system focused on quality*

4. Strategic Approach to Quality in Journalism, Applied Research and Innovation in Journalism

As has already been pointed out, there is no available know-how to implement a QMS along the lines outlined here at the current stage of the journalism industry. No clearly defined parameters, metrics or technical and technological tools can integrate the current production and evaluation processes. In other words, news organisations produce content without generating quality indicators that could certify compliance with declared requirements to themselves and all their interested parties.

In the previous section, an effort was made to outline (a) a clear set of requirements open for validation by interested parties and (b) a QMS capable of systematising the requirements from their origins through the internal processes of definition, planning, execution, evaluation and improvement.

The challenge for journalism, as an academic field and an industrial sector, lies in developing more advanced know-how than is currently available to enable accurate editorial planning rooted in requirements endorsed by relevant interested parties, the establishment of production processes guided by verifiable and measurable parameters and evaluation processes anchored in the same parameters.

As highlighted earlier, this can only be achieved through applied research and experimental development. Assuming that the primary and secondary requirements presented briefly are acknowledged by the interested parties with some degree of consensus, applied research in journalism has three main axes of practical problems to tackle:

Producing diagnoses: (a) which evaluation methods are capable — internally and externally — of gauging and measuring satisfaction levels regarding editorial management, processes, and journalistic products?; (b) which problems identified by these methods need to be addressed?

Development of editorial solutions: (a) develop appropriate evaluation methods to measure requirements in editorial management, processes, products and with interested parties; (b) seek innovative solutions to address the problems identified and devise management tools, implementing processes and new products in which the presence of requirements is measurable and evident;

Development of technological solutions: (a) develop software capable of implementing editorial management, production processes and product presentation, focusing on quality and equipped with performance metrics available across the workflow, from planning to product delivery.

Effectively addressing the three axes of problems requires a cohesive approach. The previous topics made partial progress on the first two. This one emphasises the third axis, crucial for seamlessly integrating the first two into a news organisation. This will require overcoming "the lack of an elaborate 'metadata culture' in information management within editorial workflows" (Pellegrini, 2012, as cited in Lima Junior & Oliveira, 2017), among other challenges, such as the lack of information structuring in the planning, management and implementation of journalistic products.

To this end, DJDB holds significant untapped potential that "emerges due to the advantages provided by DB [databases] in constructing and managing journalistic websites and structuring and presenting content" (Barbosa, 2008, p. 91). The author points out 18 functions the DJDB can implement, focusing on internal product management, investigative processes, contextualisation, information structuring, news drafting, data retrieval, and content presentation. Such possibilities enable the development of publishing systems that incorporate reporting, message drafting, and content editing subsystems (Schwingel, 2012). Leveraging these technological resources can significantly enhance the quality of journalism.

Creating a QMS for journalism, according to the specifications outlined here, will require rethinking the journalistic production process to leverage the available DJDB functionalities. It will require a connection with so-called "structured journalism",

> a novel digital journalism trend that contemplates reuse, data accumulation, revision, and comparing current and archived information. It is defined as a system in which database-like storage and access to information is combined with the potential for exploitation and dissemination of digital journalism. (Freixa et al., 2017, p. 1076)

The existing technology for developing computerised systems is necessary but insufficient because it depends on journalism's conceptual and operational systematisation, which provides the parameters. This underscores the need for journalism to undergo a reconfiguration based on a well-defined requirements matrix and for the implementation and monitoring to be structured through a QMS. Without this structured framework, any attempt to develop software capable of implementing this proposal would likely fall short in effectiveness.

Figure 3 illustrates this principle. The definition of primary and secondary requirements should guide the flow of journalistic production through a QMS, which structures the requirements, the processes for obtaining them and the monitoring metrics that will define the parameters of a quality-orientated information system, whose technological viability is inscribed in the possibilities of structured journalism and DJDB.

Qualijor (Guerra, 2016), a software designed to streamline the flow of quality-orientated journalistic production, is an example of such an endeavour. Figure 4 illustrates how the software works on the editorial process flow screen. It outlines the basic steps for assessing relevance and plurality based on matrices that act as editorial planning tools. The system is designed to generate real-time production indicators based on information journalists provide regarding news values, topics and sources. These procedures, which are manual in the current version of the software, can be implemented with the help of artificial intelligence.

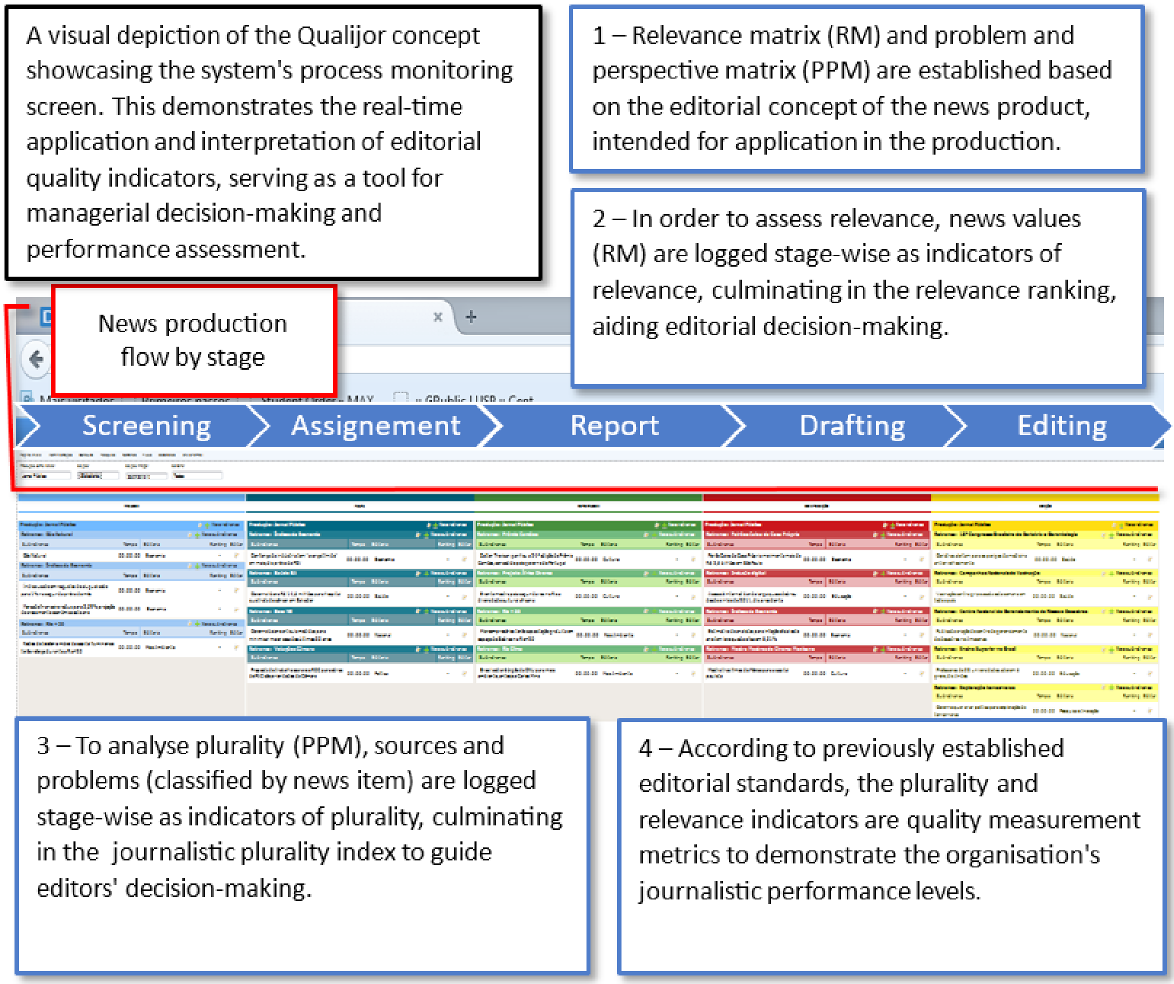

Figure 4. *Operational overview of Qualijor, software that incorporates quality indicators into the management of the journalistic production process*

The system incorporates fundamental aspects of structured journalism and DJDB but is at an early stage for professional application. Nevertheless, the concepts outlined in this article have been partially implemented. This technological possibility makes quality-orientated journalism feasible in the terms presented here, under significantly better conditions than in the past.

5. Final Considerations

The current crisis in journalism's business model and credibility underscores the critical need for quality. However, there is no consistent movement in the sector to provide journalism with a robust structure to promote and evaluate editorial quality. This article advocates two approaches focused on applied research and experimental development:

Creating a QMS based on an SAQJ. This requires reframing the concept of quality, not merely about evaluating individual products or processes, but conceiving quality as a system, the organisation's efforts to promote and implement quality in its processes and products. It involves defining evaluation requirements and metrics to guide production, from the initial editorial concept to delivering the final product to the audience and society.

The second strategy involves leveraging the technological possibilities within DJDB and structured journalism. This aims to create content management and publishing software that enables the implementation of the QMS within journalistic organisations tailored to their specific professional practices.

The proposals outlined here are still being determined. They certainly require many interventions to promote adjustments, improvements and the incorporation of new resources. These actions involve academic, professional and business sectors, among other interested parties.

Both movements demand innovation. The current editorial model lacks metrics and rigorous methods for measuring the quality claimed by organisations, failing to uphold the trust placed by society in these professionals and companies. The first movement requires editorial innovation and the second calls for technological innovation. Their collaboration can yield a new journalistic intelligence essential for implementing the SAQJ and addressing the contemporary challenges in journalism.

Translation: Anabela Delgado

Acknowledgements

To the Conselho Nacional de Desenvolvimento Científico e Tecnológico, a Brazilian research institution, funding the project *Credibilidade Jornalística: Formulação de Indicadores de Fortalecimento do Jornalismo Para o Combate aos Ecossistemas de Desinformação* (Journalistic Credibility Index: Formulating Indicators for Strengthening Journalism to Combat Disinformation Ecosystems; Process No. 403634/2021-0), of which this article is a partial result of one of the research strands.

References

Anderson, C. W., Bell, E., & Shirky, C. (2012). *Post-industrial journalism: Adapting to the present*. Tow Center for Digital Journalism, Columbia University.

Anderson, P. J. (2014). Defining and measuring quality news journalism. In P. J. Anderson, G. Ogola, & M. Williams (Eds.), *The future of quality news journalism: A cross-continental analysis* (pp. 23–39). Routledge.

Associação Brasileira de Normas Técnicas. (2015a). *ABNT NBR ISO 900: Sistemas de gestão da qualidade — Fundamentos e vocabulario*. ABNT.

Associação Brasileira de Normas Técnicas. (2015b). *ABNT NBR ISO 901: Sistemas de gestão da qualidade — Requisitos*. ABNT.

Barbosa, S. (2008). Modelo jornalismo digital em base de dados (JDBD) em interação com a convergência jornalística. *Textual & Visual Media*, *1*, 87–106.

Bertrand, C. J. (2002). *O arsenal da democracia: Sistemas de responsabilização da mídia* (M. L. Loureiro, Trans.). Editora da Universidade do Sagrado Coração. (Original work published 1999)

Carvalho, M. M. (2005). Histórico da gestão da qualidade. In M. M. Carvalho & E. P. Paladini (Eds.), *Histórico da gestão da qualidade: Teoria e casos* (pp. 1–24). Elsevier.

Chiavenato, I. (2007). *Administração: Teoria, processo e prática* (4th ed.). Elsevier.

Christofoletti, R. (2010). *Indicadores da qualidade no jornalismo: Políticas, padrões e preocupações de jornais e revistas brasileiros*. UNESCO.

Cristian, C. F., Glasser, T. L., McQuail, D., Nordesntreng, K., & White, R. A. (Eds.). (2009). *Normative theories of the media: Journalism in democratic societies*. University of Illinois Press.

Fengler, S., Eberwein, T., Mazzoleni, G., Porlezza, C., & Russ-Mohl, S. (Eds.). (2014). *Journalists and media accountability: An international study of news people in the digital age*. Peter Lang.

Franciscato, C. (2005). *A fabricação do presente: Como o jornalismo reformulou a experiência do tempo nas sociedades ocidentais*. Editora UFS/Fundação Oviêdo Teixeira.

Franciscato, C. (2006, November 8–10). *Considerações metodológicas sobre a pesquisa aplicada em jornalismo* [Conference presentation]. IV Encontro Nacional da Associação Brasileira dos Pesquisadores em Jornalismo, Porto Alegre, Brazil.

Freixa, P., Pérez-Montoro, M., & Codina, L. (2017). Interacción y visualización de datos en el periodismo estructurado. *El Profesional de la Información*, *26*(6), 1076–1090. https://doi.org/10.3145/epi.2017.nov.07

Gomes, W. (2009). *Jornalismo, fatos e interesses*. Ensaios de teoria do jornalismo. Insular.

Guerra, J. L. (2010). Sistema de gestão de qualidade aplicado ao jornalismo: Possibilidades e diretrizes. *E-Compós*, *13*(3), 1–16. https://doi.org/10.30962/ec.470

Guerra, J. L. (2016). Qualijor – Sistema de gestão da produção jornalística orientado para a qualidade editorial: Pesquisa aplicada e de desenvolvimento experimental em jornalismo. *E-Compós*, *19*(3), 1–26. https://doi.org/10.30962/ec.1291

Guerra, J. L. (2020). Ranking Q-Avalia da qualidade jornalística Brasil-Portugal 2018: Uma avaliação experimental. *Estudos em Jornalismo e Mídia*, *17*(1), 54–75. https://doi.org/10.5007/1984-6924.2020v17n1p54

Guerra, J. L., & Feitoza, L. (2020). Relevância jornalística: Conceito, fundamentos e aplicação. *LemD – Linguagem em (Dis)curso*, *20*(2), 401–419. https://doi.org/10.1590/1982-4017-200210-10419

Gordillo, M. M., Valencia, O. B., & Cruz, I. R. (2013). El valor agregado periodístico, herramienta para el periodismo de calidad. In J. L. G. Mompart, J. F. G. Lozano, & D. P. Sampio (Eds.), *La calidad periodística: Teorias, investigaciones y sugerencias profesionales* (pp. 121–137). Universitat Autònoma de Barcelona/Universitat Pompeu Fabra.

Kovach, B., & Rosenstiel, T. (2001). *The elements of journalism: What newspeople should know and the public should expect*. Crown Publishers.

Lacy, S., & Rosenstiel, T. (2015). *Defining and measuring quality journalism*. Rutgers School of Communication and Information.

Lima Junior, W., & Oliveira, A. (2017). Jornalismo estruturado: Uso de metadados para enriquecimento de bases noticiosas na web. *Revista FAMECOS*, *24*(3), Article ID25666. https://doi.org/10.15448/1980-3729.2017.3.25666

Machado, E., & Sant'Ana, J. (2014). Limitações metodológicas na pesquisa em jornalismo: Um estudo dos trabalhos apresentados no GT de jornalismo da COMPÓS (2000-2010). *Pauta Geral*, *1*(1), 29–45. https://doi.org/10.18661/2318-857X/pauta.geral.v1n1p26-42

McQuail, D. (2003). Responsibility and accountability conceptual distinctions. In D. McQuail (Ed.), *Media accountability and freedom of publication* (pp. 9–25). Oxford University Press.

McQuail, D. (2013). Principles of journalistic performance. In D. McQuail (Ed.), *Journalism and society* (pp. 27–39). SAGE.

Meditsch, E., & Moreno, C. A. de. (2004). Estudos em jornalismo. *INTERCOM – Revista Brasileira de Ciências da Comunicação*, *27*(2), 93–107. https://doi.org/10.1590/rbcc.v27i2.1070

Meyer, P. (2007). *Os jornais podem desaparecer? Como salvar o jornalismo na era da informação* (P. de Cia, Trans.). Contexto. (Original work published 2004)

Mompart, J. L. G., & Sampio, D. P. (2013). El reto dela excelência: Indicadores para medir la calidad periodistica. In J. L. G. Mompart, J. F. G. Lozano, & D. P. Sampio (Eds.), *La calidad periodística: Teorias, investigaciones y sugerencias profesionales* (pp. 121–137). Universitat Autònoma de Barcelona/Universitat Pompeu Fabra.

Morales-Vargas, A., Pedraza-Jiménez, R., & Codina, L. (2022). Qualidade da web em mídia digital: Revisão bibliográfica sobre métodos e indicadores gerais de avaliação e atributos de confiança. *Revista Latina de Comunicación Social*, (80), 39–63. https://www.doi.org/10.4185/RLCS-2022-1515

Newman, N., Fletcher, R., Robertson, C. T., Eddy, K., & Nielsen, R. (2022). *Reuters institute digital news report 2022* (Vol. 2022). Reuters Institute for the Study of Journalism. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2022-06/Digital_News-Report_2022.pdf

News Guard. (2023). *Rating process and criteria*. Retrieved March 15, 2023, from https://www.newsguardtech.com/ratings/rating-process-criteria/

Odriozola-Chéné, J., Gutiérrez-Atala, F., Domínguez-Panamá, J. J., & Pérez-Arozamena, R. (2019). Las relaciones de las influencias en los procesos de producción informativa y sus efectos en la calidad periodística. Una visión desde Latinoamérica. *Cuadernos.info*, (44), 119–134. https://doi.org/10.7764/cdi.44.1297

Organisation for Economic Co-Operation and Development. (2015). *Frascati manual 2015: Guidelines for collecting and reporting data on research and experimental development*. OECD Publishing. https://doi.org/10.1787/9789264239012-en

Organisation for Economic Co-Operation and Development. (2018). *Oslo manual 2018: Guidelines for collecting, reporting and using data on innovation*. OECD Publishing. https://doi.org/10.1787/9789264304604-en

Palacios, M. (2011). *Ferramentas para análise de qualidade no ciberjornalismo. Volume 1: Modelos*. LabCom Books.

Paladini, E. P. (2005). Perspectiva estratégica da qualidade. In M. M. Carvalho & E. P. Paladini (Eds.), *Histórico da gestão da qualidade: Teoria e casos* (pp. 25–84). Elsevier.

Pinto, M., & Marinho, S. (2003, April 10–11). *A qualidade em jornalismo: Problematização e operacionalização do conceito* [Conference presentation]. I Congresso Luso-Brasileiro de Estudos Jornalísticos e ao II Congresso Luso-Galego de Estudos Jornalísticos, Porto, Portugal. https://hdl.handle.net/1822/997

Reporters Without Borders. (2021). *Journalim Trust Initiative*. Retrieved March 15, 2023, from https://rsf.org/en/journalism-trust-initiative

Rosengren, K. E., Carlsson, M., & Tagerud, Y. (1996). Quality in programming: Views from the North. In S. Ishikawa (Ed.), *Quality assessment of television* (pp. 49–60). University of Luton Press.

Rothberg, D., & Garrido, B. A. (2019). Jornalismo, gestão da qualidade e regulação: Estudo comparado de 42 corporações de mídia. *Estudos em Jornalismo e Mídia*, *16*(1), 85–97. https://doi.org/10.5007/1984-6924.2019v16n2p85

Salaverría, R. (2003). Convergencia de los medios. *Chasqui*, *81*, 32–39.

Santos, E., & Guazina, L. (2020). Qualidade no jornalismo: Percursos estrangeiros, problemas brasileiros. *Estudos em Jornalismo e Mídia*, *17*(1), 32–47. https://doi.org/10.5007/1984-6924.2020v17n1p32

Schwingel, C. (2012). *Ciberjornalismo*. Paulinas.

Slack, N., Chambers, S., & Johnston, R. (2007). *Administração da produção* (M. T. Corrêa, F. Alher, & H. L. Corrêa, Trans.). Atlas. (Original work published 1997)

Strömbäck, J. (2005). In search of a standard: Four models of democracy and their normative implications for journalism. *Journalism Studies*, *6*(3), 331–345. https://doi.org/10.1080/14616700500131950

Swanepoel, T. (2012). *A comprehensive quality management model for community newspapers* [Doctoral dissertation, North-West University].

Torre, L., & Téramo, M. T. (2007). Investigación sobre calidad periodística em la Argentina. In A. A. Suárez (Ed.), *Periodismo de calidade: Debates y desafios* (pp. 39–62). La Crujia; Fopea.

Träsel, M., Lisboa, S., & Reis, G. (2018). Indicadores de credibilidade no jornalismo: Uma análise dos produtores de conteúdo político brasileiros. In *Anais do XXVII Encontro Anual da Compós* (pp. 1–19). Pontifícia Universidade Católica de Minas Gerais.

The Trust Project. (2023). *About us*. Retrieved March 15, 2023, from https://thetrustproject.org/about/

Vehkoo, J. (2009/2010). *What is quality journalism and how it can be saved*. Reuters Institute for the Study of Journalism.

Biographical Note

Josenildo Luiz Guerra is a full professor at the Federal University of Sergipe, contributing to the Journalism course and the Postgraduate Programme in Communication. He holds a PhD in Communication and Contemporary Culture from the Universidade Federal da Bahia (2003) and pursued post-doctoral studies at the University of Minho (Portugal; 2017/2018). He is one of the leaders of the Journalism Studies Laboratory and the coordinator of Qualijor (Program of Research Quality, Innovation and Applied Technology in Journalism), affiliated with the Rede Nacional de Observatórios da Imprensa. Guerra specialises in applied research and experimental development, devising technical and technological solutions to enhance journalistic practices and quality assessment. He is currently part of the *Índice de Credibilidade Jornalística* project, collaborating with researchers from five Brazilian universities.

ORCID: https://orcid.org/0000-0001-5242-863X

Email: jguerra@academico.ufs.br

Address: Departamento de Comunicação Social, Universidade Federal de Sergipe. Cidade Univ. Prof. José Aloísio de Campos, Av. Marcelo Deda Chagas, s/n, Bairro Rosa Elze, São Cristóvão, Sergipe, Brasil. CEP 49107-230

Submitted: 11/04/2023 | Accepted: 13/11/2023

Comunicação e Sociedade, vol. 44, 2023, e023024
https://doi.org/10.17231/comsoc.44(2023).4751

Bibliometric Study on Quality Journalism in the Scopus Database: Evolution of the Topic and Characteristics

Luisa del Carmen Martínez García
Departamento de Comunicación Audiovisual y Publicidad, Universidad Autònoma de Barcelona, Barcelona, Spain
Data curation, formal analysis, visualization

Edson Capoano
Departamento de Jornalismo, Escola Superior de Propaganda e Marketing, São Paulo, Brazil
Formal analysis, writing – original draft, writing – review & editing

Abstract

This article uses a term search to describe how academic work on the relationship between journalism and quality has evolved. It relies on a bibliometric study and content analysis of the Scopus database. Using the VOSviewer tool, this article presents automated analyses of the Scopus system and network maps that pertain to article terms. The goal is to outline scientific production's features and the impact of research on quality journalism identifying emerging trends in this research area. The study sample consists of 971 research articles published between 1939 and 2022, specifically focusing on social sciences articles across various languages, indexed in Scopus.

The findings suggest a rising interest in journalism quality within analysed scientific journals, especially in the 21st century, predominantly in Western countries, despite a growing trend in Eastern countries. The United States is the primary source for articles, citations, and first authors. Additionally, the three journals publishing most on journalism quality are of Anglo-Saxon origin. Research clusters are developed on the object of study outside this axis, led by Spanish and Portuguese scientific production. The bibliometric analysis also shows the evolution of topics related to journalism quality.

Keywords
journalism quality, Scopus, bibliometric study, content analysis

Estudo Bibliométrico Sobre Jornalismo de Qualidade na Base de Dados Scopus: Evolução do Tema e Características

Resumo

Este artigo pretende descrever a evolução da produção acadêmica sobre o binômio jornalismo e qualidade, a partir do estudo bibliométrico e análise de conteúdo da base de dados Scopus, através de busca do termo. Para tal, são apresentadas análises automatizadas do sistema Scopus e mapas das redes sobre os termos dos artigos, através da ferramenta VOSviewer. O objetivo é descrever as características da produção científica e o impacto da pesquisa no campo de estudo do jornalismo de qualidade e identificar tendências neste campo de pesquisa. A amostra do estudo é composta por 971 artigos de pesquisa publicados entre os anos de 1939 e 2022 e indexados na Scopus, levados em consideração apenas artigos de pesquisa publicados na área de ciências sociais em qualquer idioma.

Os resultados indicam que o interesse sobre a qualidade do jornalismo cresce nas revistas científicas analisadas a partir do século XXI e com predominância de países ocidentais, apesar da tendência de crescimento nos países orientais. Os Estados Unidos são a origem do maior número de artigos, de citações e de primeiros autores; as três revistas que mais publicam sobre qualidade do jornalismo também são anglo-saxônicas. Há desenvolvimento de *clusters* de investigações sobre o objeto de estudo fora desse eixo, capitaneados pela produção científica espanhola e portuguesa. A análise bibliométrica também mostra a evolução dos temas relacionados com a qualidade do jornalismo.

Palavras-chave

qualidade do jornalismo, Scopus, estudo bibliométrico, análise de conteúdo

1. Introduction

The quality of journalism plays a pivotal role in maintaining the field's credibility, informing the public and shaping public opinion. The concept of quality of journalism is frequently linked to the quality of the information it provides through news. Thus, ensuring that the information reported is accurate, objective and based on verifiable facts, without deliberate distortion, is essential. In this context, the relevance of the information to the public, the thoroughness of coverage and the clarity of the language used to communicate the information understandably are essential considerations. Consequently, scientific articles frequently discuss the media's adherence to accuracy, relevance, impartiality, clarity, and depth of information presented (Kovach & Rosenstiel, 2021; McQuail, 2010).

However, understanding the concept of quality in journalism extends beyond news content; it encompasses processes, information accuracy, the journalistic business, and the media. In information science studies, quality or knowledge is perceived as a commodity, subject to development, acquisition, ownership, or trade, considering objective and subjective facets of information. Ferreira (2011), for example, identified what information quality is in journal articles and proceedings of scientific events in the field of information sciences, communication and journalism in English between 1974 and 2009. They identified 101 attributes, condensed into 40 quality attributes grouped under three broad categories: "medium", "content", and "use". In communication science studies, there is a tension between longstanding concepts of quality, such as the diversity of sources or polyphony, thematic variety, advocating citizenship and reflecting the public debate (Shoemaker & Reese, 1996), and concepts borrowed from information sciences (Tuominen et al., 2005) and introduced into the communication sciences through digitisation and convergence within the journalistic field during the 21st century (Jenkins, 2006; Salaverría Aliaga et al., 2010). Finally, the quality of information in journalism can be defined as the professional activity of compiling, analysing and disseminating current information, adhering to legal regulations and codes of ethics (Society of Professional Journalists, 2014), as well as the business aspects of their activity (Sánchez, 2015). Assessing the quality of journalism should consider these dimensions, which mark or determine its limits, restrictions and requirements.

This article illustrates how quality journalism is researched in scientific journals indexed on the Scopus platform. This way, it aims to identify the prevalent themes related to the object of study, trace its evolution over the last few decades, and scrutinise the nationality of the authors and the origin of the articles, ultimately contributing to the current understanding of journalism and quality. The results of the research analysis are organised into two sections. The first section delves into the findings of the quantitative analysis, and the second section elaborates on relationships and co-occurrences using visualisation maps generated by the VOSviewer software.

2. Theoretical Framework

In an overview of the subject of this article, Meyer's (2002) work stands out as a significant milestone in studying the accuracy and reliability of news information. Meyer's emphasis on rigorous research techniques underscores their crucial role in ensuring the quality of journalistic reports, thereby contributing significantly to the methodological underpinnings of quality journalism.

Alternate perspectives on media-provided information quality emphasise accuracy, objectivity, and clarity as pivotal components in determining the quality of journalism (Weaver & Wilhoit, 2020). Their comprehensive analyses have contributed to understanding the ethical and professional benchmarks that uphold press credibility. Blumler and Gurevitch (2002) underscore the significance of source diversity, polyphony, and representing public discourse in bolstering the quality of journalism and fostering active citizenship.

In the 21st century, Boczkowski (2005) explores how digitisation and convergence within journalism shape both the production and consumption of news, thereby influencing the quality of journalism in this century. McQuail (2010) is another reference on the quality of journalism, addressing the relevance of information to the public and the need for news coverage transcending mere factual reporting, delving deeper into issues to promote a comprehensive understanding of events.

Moreover, Mcquail (2010) had previously outlined five quality values for the media: freedom, equality, diversity, truth and quality of information, and social order and solidarity. Meanwhile, Bogart (2004) assesses the quality of newspapers based on factors like source diversity, multiple perspectives, vigilant reporting, and providing contextualised news.

The media's public quality has the potential to elucidate democratic values for spectators and listeners (Dagger, 1997). Specifically in the United States, public journalism has been proposed as a means to improve the quality of the American press by reconnecting newsrooms with their readers, listeners and viewers, promoting citizen engagement in the pursuit of shared values and tangibly improving the press (Rosen, 2000).

Quality in communication can manifest prominently within popular journalism (Meijer, 2001), wherein it upholds attributes such as defending democracy, ensuring the independence of the journalist or information producer, maintaining rationality in opinions and content, and prioritising information quality. Conversely, the quality of information can be compromised within major news outlets (Christofoletti, 2008), especially when the communications sector experiences monopolisation, restricting information diversity to a handful of providers, a phenomenon exacerbated by the convergence and digitisation of communications.

Among the various approaches to achieving quality in journalism, certain fundamental elements play a crucial role in providing citizens with the information they need to be free and self-governing: truth, loyalty to citizens, verification discipline, independence, impartial oversight of power, fostering public discourse, delivering meaningful, engaging, and pertinent information, ensuring comprehension and proportionality, and upholding freedom of conscience (Kovach & Rosenstiel, 2021). Similarly, these attributes emerge as parameters for journalism: truthfulness, communicability, plurality, freedom, socio-referentiality, intelligibility and transmissibility (Benedeti, 2009).

Listening carefully to news users could expand the scope of journalism's narrative and democratic repertoire (Meijer, 2013). Contemporary audiences seek involvement in the journalistic process and expect a more refined reflection of their circumstances, experiences, concerns and interests. Rather than focusing solely on media content or its intended purpose, media users often respond based on the daily impact of media. The "quality of life" concept emerges as a normative standard for value journalism.

> Yet, scholars of journalism and professional journalists focus in particular on the quality of journalistic content and by extension on the quality of the production conditions of news. Audience research plays a marginal role in journalism studies. This may be partly due to the implicit or explicit assumption that a concern with quality is hard to reconcile with an audience perspective. (...) Although professional journalists are well aware of the increasing relevance of ratings, hits, shares and circulation figures, many in fact consider the mounting attention paid to audiences as one of the signs and causes of the gradual loss of journalistic quality. (Meijer, 2013, pp. 754–755)

Slow journalism offers an alternative to quality journalism, adopting an approach more aligned with the epistemological possibilities of postmodern culture (Harbers, 2016). This implies an aggregative truth rooted in open moral foundations, as journalists guide readers through relevant information, research, observation and experimentation with reality.

> They are structured around the mediating subjectivity of the journalists and are thus openly subjective. Yet, they also draw on empirical research and scientific knowledge. Moreover, they are transparent about the reporting

> process, which through their reflection becomes an integral part of the story itself. Thus, being transparent about their combination of different forms of knowledge, rooted in more traditional rational-positivistic inquiry as well as in personal experience and emotion, they try to reconcile the tension between the modernist and postmodernist claims to truth. (Harbers, 2016, p. 494)

Thus, the debate on the quality of journalism touches on the interest of various scholars and professionals, according to Lacy and Rosenstiel (2015), in three approaches: identifying the characteristics of quality-oriented news organisations, identifying the content attributes that reflect the output of these organisations, and analysing engagement data to see what kind of quality resonates with audiences. In this way, the researchers suggest common characteristics of content quality: quality of presentation, reliability, diversity, depth and breadth of information, comprehensiveness, public affairs, and geographical relevance.

Meanwhile, although the quality of journalism has been widely defined and assessed by professionals and researchers using a product approach, other perceptions on the subject vary in their approaches to determining the object of study beyond content. There are different directions or poles of interest regarding the quality of journalism (Pinto & Marinho, 2003): quality as a trait of the organisation and the product, quality perceived as a public service and quality seen as a strategic investment. With this, these authors identify quality in the enhanced organisational efficiency and effectiveness with the proposition of attributing more value to the time and money spent by consumers, the provision of a service aimed at citizens to improve their understanding of the public space and reinforce democracy, and the articulation of the idea of quality with the idea of business, highlighting that quality sells and can be a worthwhile investment. Accordingly, they propose six dimensions for research into quality in journalism: sources of information, multimedia companies and groups, conditions and characteristics of the journalism profession, journalistic production, technologies, audiences and communication and information policies.

A decade later, the different perspectives on what constitutes quality journalism have been revisited, with different agendas and backgrounds of scholars and professionals interested in the topic. While the academic literature examines the quality of journalism from the production and product side, Lacy and Rosenstiel (2015) propose the demand approach, which assesses content attributes based on how well they meet an individual's information needs and desires. Ultimately, the quality assessment would be based on the individual's motive for accessing and consuming journalism, which may differ depending on their information interests and psychological needs.

As such, combining the demand and product approaches can generate new ways of understanding the quality of journalism. Whereas the demand approach assesses the quality of journalism based on consumers' perceptions of how well journalism meets their needs and wants, the product approach assumes that there are inherent characteristics of messages that can be changed to improve the quality of the content (Lacy & Rosenstiel, 2015).

3. Methodology

This research methodology is quantitative, using a bibliometric study and content analysis. The content analysis aims to describe the evolution of academic production on the relationship between journalism and quality. Specifically, it seeks to outline the features of scientific production and the impact of research on quality journalism. This study will be combined with a bibliometric analysis to identify trends in this field of research.

The quantitative content analysis is descriptive, and the data was extracted from Scopus (the bibliometric analysis also uses the same database). The categories analysed are those covered by Scopus. This study analysed the following: the article's authorship, the authors' country of origin, the article's title, the year of publication, the journal's name, the journal's origin and the article's keywords.

Bibliometric analysis is a research method used to evaluate and quantify academic and scientific production in a specific field, aiming to understand trends, patterns and the influence of research in a given domain. In this case, the analysis is based on the model by Sharifi et al. (2021) and adapted to the needs of this research. There are two stages to the analysis: (a) creating the database and (b) analysing the data using Excel and VOSviewer. These stages can be divided into the following phases:

1. Identifying the database: the Scopus database was selected as the data source for this study because it is considered one of the most complete and up-to-date databases within scientific research.
2. Defining the search: an exhaustive and rigorous search was run using the keywords "journalism" and "quality", as well as Boolean operators such as "and", which are logical operators that connect words to broaden or narrow the results.
3. Selecting the articles: articles that met the inclusion criteria established for the study were selected, including research articles published in social sciences journals. The aim was to provide an evolutionary description of the subject, so articles published between 1936 and 2022 were researched.
4. Extracting data: the data was extracted according to the possibilities of Scopus, and descriptive data on the articles was recorded, such as title, authorship, journal, year of publication, keywords, abstract, citations received, academic affiliations and research funds, among others. With the data extracted from Scopus, two databases were created: one in Excel for the quantitative content analysis and another in CSV format (a file that divides the values by commas) to conduct the bibliometric analysis with VOSviewer.
5. Quantitative content analysis: a descriptive analysis of the data was undertaken to provide an overview of the selected articles' properties, such as the evolution of the publications over time, the articles' languages, the author's country of origin (first author), complemented by qualitative observations to understand the specific contribution of the authors who sign more than three articles indexed in Scopus, the main journals that publish on the subject and the publications' language of origin.
6. Bibliometric analysis (co-occurrences): VOSviewer was used to analyse the co-occurrence between words, or in other words, the occurrence of words or terms together extracted from the keywords of the articles in the sample. The aim was to determine how often the two topics were included together.

7. Interpreting the results: finally, the results obtained from the analyses conducted in Excel and VOSviewer were interpreted. It was possible to draw conclusions on the state of research into quality journalism, identify possible research gaps and establish areas for future research.

It is important to emphasise that "when using bibliometric indicators, (...) indicators do not usually provide an exact measurement of the concept of interest, but can only provide approximate information" (Waltman & Noyons, 2018, p. 4).

The study sample comprises 971 research articles published between 1939 and 2022 and indexed in Scopus. As mentioned above, only research articles published in the social sciences, in any language, were considered.

4. Findings

4.1. Quantitative Analysis Findings

Scientific production on quality and journalism in the field of social sciences has grown since 2006 (Figure 1). However, the growth is not uniform; there is no discernible pattern: some years show a lower number of articles in Scopus than the previous year; for example, in 2017, 63 research articles were indexed, while in 2018, there were 86, and in 2019, it fell 67.

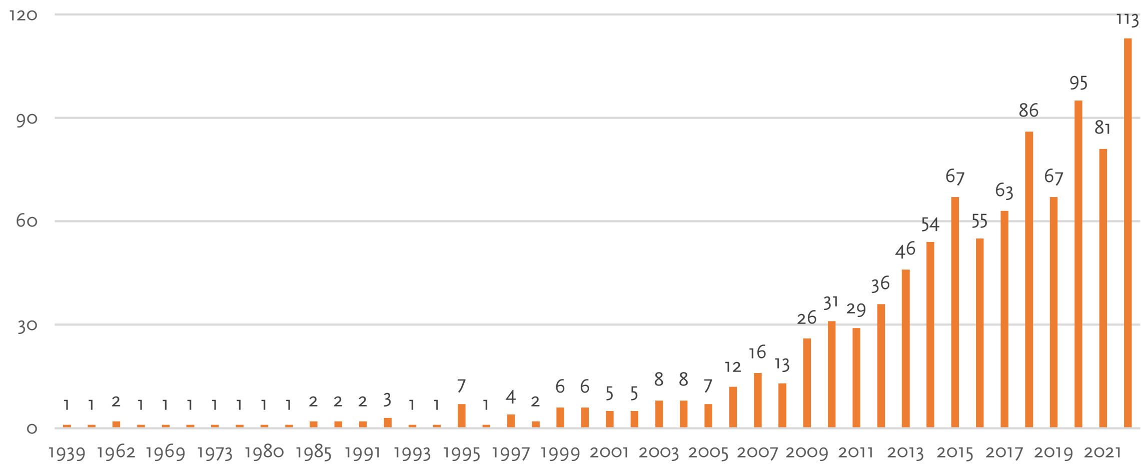

Figure 1. *Evolution of the number of articles published on journalism and quality by year*

The graph in Figure 1 shows the evolution of interest in the topic, which is a recent interest in the field of social sciences, considering the sample. About 39% of the registered publications are condensed into four years (2018, 2020, 2021 and 2022). It is worth noting that the highest number of publications identified per year on journalism and quality refers to the three years of the COVID-19 pandemic. The study on journalistic quality is presumably related to the coverage of the coronavirus.

The articles are written in 25 languages, most of them Western: English, Spanish, Russian, German, Portuguese, French, Swedish, Chinese, Dutch, Hungarian, Croatian, Polish, Italian, Norwegian, Arabic, Lithuanian, Slovenian, Afrikaans, Finnish, Japanese, Latvian, Malay, Slovak, Turkish and Catalan. Some articles are also bilingual: in English and Spanish (0.9%), in English and French (0.1%) and in English and Portuguese (0.1%).

Table 1 shows the countries of origin (affiliation) of the first authors of the articles analysed (countries with 10 or more articles). To complement this data, we identified the authors who topped the rankings of published articles (authors with more than three articles) and noted qualitative and general observations about their scientific careers. The first detailed finding is that the United States has the highest number of first authors identified in the articles, representing 23% of the sample. Among this percentage, the scientific production of the scholar Jesse Abdenour (University of Oregon) stands out. His research interests analyse the production of quality information on non-fiction, its effective communication and the identification of solutions to maintain quality despite social crisis contexts. Secondly, the work of Scott Reinardy (University of Kansas), who has dedicated most of his research to studying the transformations in journalists' production routines following digital convergence and the various actions that the profession has faced despite precarious conditions. Lastly, Anya Schiffrin's (Columbia University, School of International and Public Affairs) research on the media in Africa is a benchmark; she also published the book *Global Muckraking: 100 Years of Investigative Journalism From Around the World* (New Press) in 2018, which compiles a series of iconic investigative reports. Work by authors from the Spanish scientific community came in second place, with 18% of the top subscriptions. Within this community, the work of three scholars stands out: Manuel Goyanes (Universidad Carlos III de Madrid), Juan Carlos Suárez Villegas (Universidad de Sevilla) and Alba Córdoba-Cabús (Universidad de Málaga). Manuel Goyanes is a reference in analysing business models in the journalism sector; he is currently conducting studies to understand the motivations that lead readers to pay for information from online media. For his part, Juan Carlos Suárez Villegas deals with journalistic ethics, informational pluralism, accountability and journalism. Meanwhile, Alba Córdoba-Cabús conducted several research studies on disinformation and data journalism. Finally, from the United Kingdom, with 7%, we highlight the contribution of J. Lewis (Cardiff University) and his studies on politics, journalism, public opinion and audiences.

Country	Number of publications
United States	224
Spain	175
United Kingdom	67
Germany	57
Australia	53
Russia	41
The Netherlands	34
No data	27
Canada	18
Sweden	15
Finland	14
Denmark	12
Brazil	10
Colombia	10

Table 1. *Country of origin of the subscribing first authors (10 or more articles)*

In total, 142 international journals published articles on journalism and quality from 1939 to 2022. Table 2 shows the 15 journals that publish the most. It should be noted that their scientific output represents 44% of the articles in this study's sample. Three Anglo-Saxon journals ranked in the top three regarding the highest number of published articles (*Journalism Studies*, *Journalism Practice* and *Journalism*).

Journal	Number of publications
Journalism Studies	74
Journalism Practice	55
Journalism	52
Profesional de la Informacion	42
Estudios Sobre el Mensaje Periodistico	38
Digital Journalism	34
Journalism and Mass Communication Quarterly	22
Australian Journalism Review	18
Revista Latina de Comunicacion Social	16
Journalism and Mass Communication Educator	16
Media and Communication	15
International Journal of Communication	13
Pacific Journalism Review	10
Comunicar	10
Communication and Society	10

Table 2. *Number of articles published per journal (10 or more articles)*

Journalism Studies has been a prominent reference in journalism research for 23 years, covering theoretical, methodological, ethical, sociological and cultural perspectives. *Journalism* is another internationally relevant journal, launched in 2000, that publishes journalism studies from economic, political, and social approaches. Meanwhile, *Journalism Practice* has published studies on the nature of journalistic practices, their evolution, ethics and the impact of technological convergence for 16 years. On the other hand, five Spanish journals are included in this ranking of the journals that have published the most on quality and journalism in Scopus. Their articles account for 12% of the publications on the subject.

For a more in-depth analysis, the magazines that dealt the most with quality in journalism were grouped according to region and country. Furthermore, adding the category "year" from 2000 to 2022 provided an evolutionary analysis of this section. The period was chosen because it offered the most significant data on quality in journalism. As a result, the three clusters obtained were magazines of Portuguese, English and Spanish origin.

The graph in Figure 2 expresses the evolution of the journals' clusters of origin. It shows that the greatest scientific production is concentrated in Anglo-Saxon journals, followed by Spanish and Portuguese journals. Anglo-Saxon journals have two major peaks, one in 2018 and the other in 2022. To contextualise the information, it is worth mentioning that in 2018, the United Kingdom exited the European Union (Brexit).

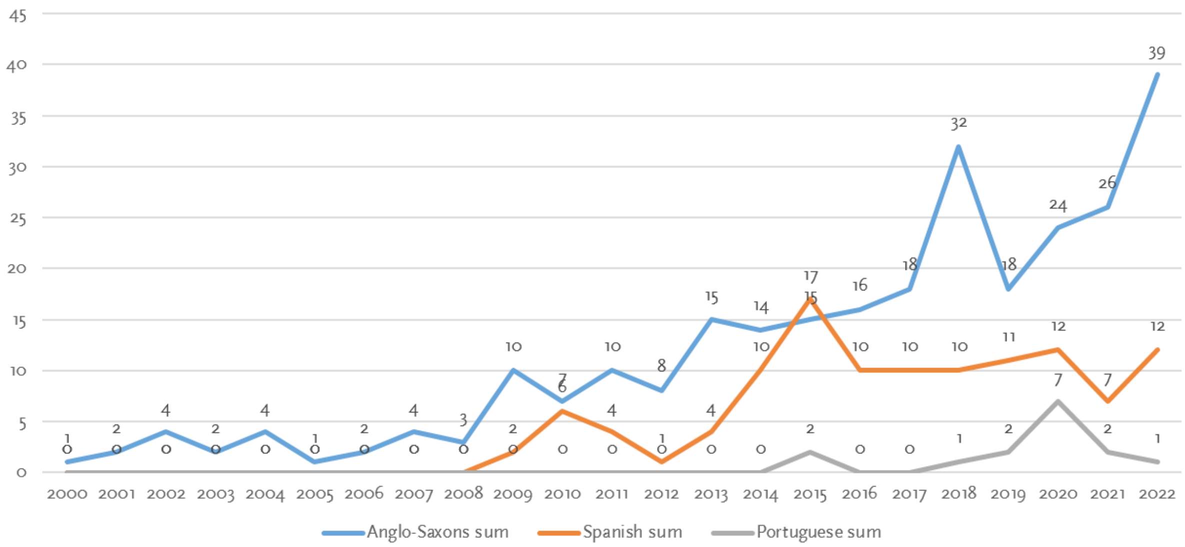

Figure 2. *Number of articles published by journal origin*

The Anglo-Saxon journal cluster has grown since 2020, coinciding with the onset of the COVID-19 pandemic. Conversely, production in the Portuguese and Spanish clusters declined in 2021. The decrease persisted until 2022 for the Portuguese cluster, while the Spanish cluster experienced renewed growth during the same period.

Regarding the Portuguese cluster, the data stems from the findings of *Media and Communication*, an open-access journal operated by Cogitatio Press, exclusively published in English. In the case of the Spanish cluster, the data relies on publications originating from Spain, available in both Spanish and English.

Analysing the most frequent words in the keywords of the articles reveals a thematic focus on research connecting quality journalism and media-produced information, notably concerning human health, medical topics, and care-related issues (Table 3).

Topics	Total
Health	72
Humans	70
Medical	54
Publication	50
Research	42
Media	39
Information	38
Quality	37
Journalism	35
Article	32
Mass	31
Analysis	31
United	27
Care	23
State	22
Social	21
Public	20
Education	19
Controlling	18
Pattern	15
Paper	14
Medicine	14
Topic	13
Literature	12
Communication	12
Studying	11
Learning	11
Medium	10
Disease	10
Attitude	10

Table 3. *Most frequent words in the keywords of the articles*

To a smaller degree, the article keywords are related to education, learning, and exploring the role of journalism or mass media in fostering quality within the journalism sphere.

4.2. Bibliometric Analysis Outcomes

The bibliometric analysis used VOSviewer software and focussed on studying keyword co-occurrences. It is important to emphasise that the information derived from the analysis tool should be perceived as an analysis of trends and approximations rather than exact scenarios.

VOSviewer grouped the keywords into four clusters (yellow, red, blue and green), as illustrated in Figure 3. The most important node is "journalism".

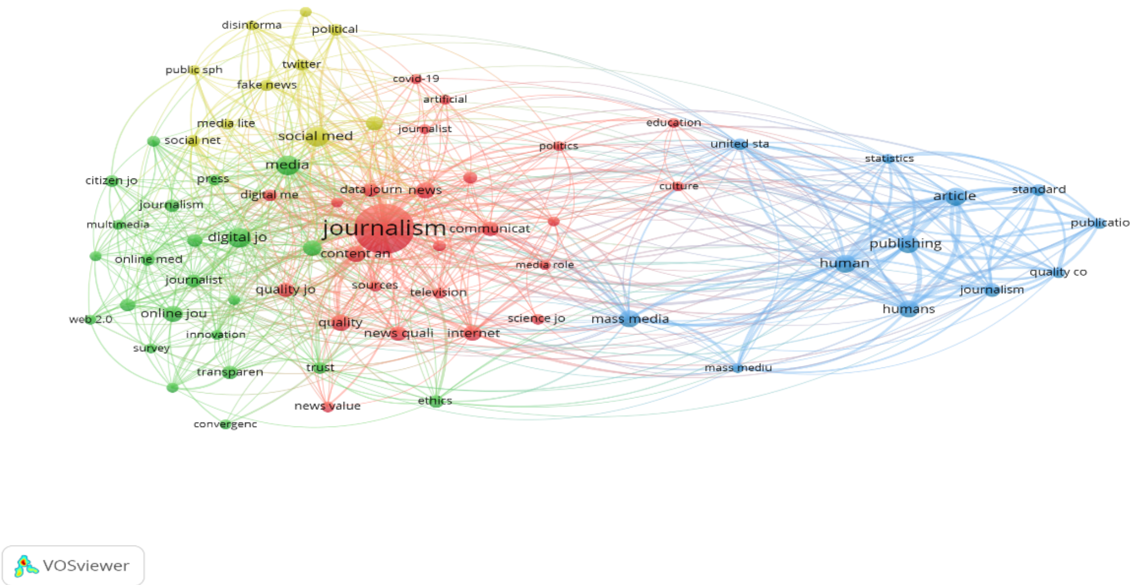

Figure 3. *Keyword co-occurrence analysis*

The clusters formed through co-occurrences indicate frequently associated terms. Figure 3 shows the articles' keywords recurrently related to the word "journalism". The clusters are listed below, detailing the words with 20 or more occurrences:

- Cluster 1 (21 keywords): represented mostly in green, featuring the keywords "digital journalism" (39 occurrences) and "online journalist" (28 occurrences);
- Cluster 2 (18 keywords): in red, the keywords "quality" (28 occurrences), "content analysis" (27 occurrences), "communication" (21 occurrences), "news quality" (21 occurrences), "quality journalism" (21 occurrences) and "data journalist" (20 occurrences) were identified;
- Cluster 3 (13 keywords): mainly expressed in yellow, "media" (40 occurrences), "social media" (40 occurrences) and "democracy" (21 occurrences);
- Cluster 4 (10 keywords): represented in blue, "human" (33 occurrences), "mass media" and "humans" (29 occurrences each) and "internet" (25 occurrences).

These outcomes with more co-occurrences highlight that the theme of "quality" primarily aligns with the elements in Cluster 2, notably connecting to keywords such as "content analysis", "communication", "news quality", "quality journalism", and "data journalist". These findings suggest that the articles focus on studies using content analysis to examine the quality of news, communication, and data journalism.

To gain deeper insight into the behaviour of keywords specifically associated with the term "journalism", a dedicated Cluster 2 map was generated (Figure 4).

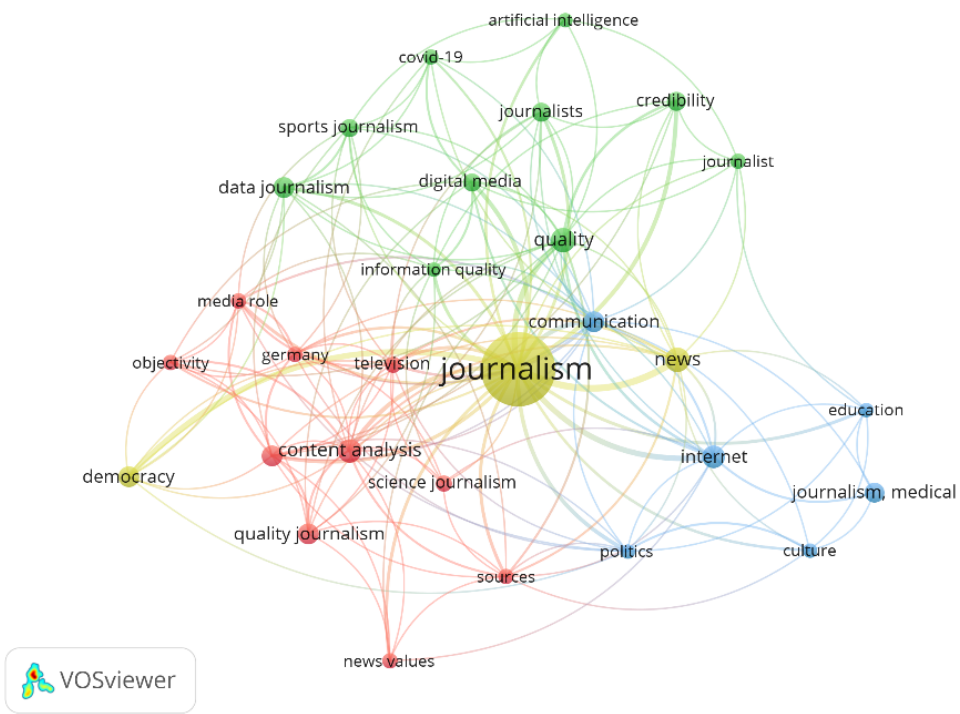

Figure 4. *Co-occurrence analysis of the keywords included in Cluster 2*

The map in Figure 4 depicts the relationships between the items and their significance (expressed by the thickness of the lines, as in the link between "journalism", "democracy", and "news"). Among the keywords associated with "quality" and "quality of information" (shown in green), the closest connections emerge with terms like "digital media", "credibility", "journalist", "artificial intelligence", "COVID-19", "data journalism", and "sports journalism". This data suggests a noticeable trend in the scientific community's interest in studying information quality in the context of the COVID-19 pandemic, exploring aspects like information quality concerning journalists and artificial intelligence.

The keywords "quality journalism" and "news value" (in red) are linked to "objectivity", "media role", "television", "science journalism", "sources", "content analysis", and "Germany". In this case, the keywords are predominantly related to the quality of journalistic information from the mass media, such as television, news values and sources.

5. Systematisation

The study underscores a remarkable evolution in academic production on journalism and quality, notably impacted by the COVID-19 pandemic, as highlighted by the prevalent occurrence of words like "health", "humans", and "medical" in the articles' keywords (Table 3).

This research provides a quantitative analysis of the academic production indexed in Scopus on journalism and quality, covering the period from 1939 to 2022. The graphical representation (Figure 1) highlights a growing interest in this domain within the social sciences, particularly evident since 2006. However, the growth is not uniform, showing significant fluctuations over the years. In the year 2017, for example, the number of articles decreased, while between 2018 and 2022, it increased substantially, followed by a remarkable surge during the years coinciding with the COVID-19 pandemic (2020, 2021, and 2022).

The prevalence of Anglo-Saxon journals and the correlation between journalistic quality and current events are prominent findings. However, the presence of Spanish authors serves as a notable counterbalance to this academic hegemony. The authors mentioned in the Spanish context stand out for the variety of approaches in their studies, encompassing deontological aspects of journalism, business models and disinformation.

Table 1 provides an overview of the geographical distribution of scientific production, prominently showcasing the United States as the frontrunner, trailed by Spain and the United Kingdom. Notably, the prevalence of articles in Western languages underscores the dominance of the Western scientific community in this field.

Finally, Table 2 outlines the most prolific journals in this domain, particularly emphasising Anglo-Saxon publications. This concentration is mirrored in the journal origin clusters (Figure 2), where Anglo-Saxon journals lead, followed by Spanish and Portuguese journals. A temporal analysis of these clusters highlights a consistent growth in Anglo-Saxon journals, especially after 2020, aligning with the onset of the COVID-19 pandemic.

The bibliometric analysis delves deeper into these trends, highlighting particular thematic areas and relationships among keywords. This integrated approach provides a more comprehensive understanding of the academic landscape around journalism and quality, laying a solid foundation for future research endeavours.

The same bibliometric analysis, now examined with the VOSviewer software, focuses on keyword co-occurrences and co-authorships by country. Figure 3 shows four primary clusters, spotlighting keywords such as “digital journalism”, “quality”, “content analysis”, “communication” and “quality journalism”. These clusters indicate key thematic areas within the field of study.

Figure 4, drawn from Cluster 2, looks closer at the relationship between specific keywords related to “quality”. Terms such as “digital media”, “credibility”, “data journalism”, and “COVID-19” stand out, indicating a significant correlation between quality studies and contemporary issues such as the pandemic.

The keywords “quality journalism” and “news quality” are linked with “objectivity”, “ media role”, “television”, and “news values”, underscoring a focus on assessing the quality of journalistic information within the mass media. This bibliometric analysis complements the quantitative approach, providing additional insights into the trends and thematic connections in academic production on journalism and quality.

6. Final Considerations

The quantitative findings show that scientific production related to quality and journalism is a relatively recent focus within the social sciences, with a surge observed from 2000 onwards, concentrating 44% of the published articles during this period. However, the growth is inconsistent, with some years displaying comparatively lower scientific production on this subject. The hegemony of production and citations on quality journalism in journals indexed by Scopus remains primarily with Anglo-Saxon countries, articles, and authors from the so-called "Global North". Approximately 97% of the articles are originally published in English.

However, it is encouraging to note some mobility at the centre of the debate over the last 20 years, particularly in the cultural-linguistic axis of scientific output on the object of study, based on productions whose authors are not from English-speaking, Western or wealthy nations. In fact, the quantitative outcomes underscore the essential role of the Spanish scientific community in this scientific production, with 18% of the primary authors originating from Spain and 14% of the main journals that have published on the subject also being Spanish. In this sense, Spanish scientific contributions challenge, to a certain extent, the hegemony of the Anglo-Saxon approach.

Nearly half of the scientific production aligns with the publication standards and selection criteria of only 15 journals, representing a mere 10% of the total journals addressing this subject. At first glance, this concentration might suggest a poorly diversified panorama.

It is interesting to observe how the concept of "quality" aligns with the prevalent themes during the period when the collected articles were produced, such as the heightened interest observed between 2020 and 2022 (13% of the total sample) coinciding with the years of the COVID-19 pandemic. This observation is further substantiated by the thematic analysis of keywords, indicating a notable prevalence of the words "health", "humans", and "medical". Additionally, the bibliometric analysis underscores the correlation between the keywords "quality" and "quality of information" with "COVID-19", among other identified cases. However, this hypothesis requires further comprehensive and detailed research for validation.

In this way, it seems that there is no watertight definition of what the quality of journalism is, at least in the sample collected. Instead, there are dynamic definitions shaped by evolving demands and ongoing debates. Nevertheless, this dynamic definition remains anchored in the thematic debates prevalent within the journalistic field, such as the challenges of disinformation in the 2020s, the proliferation of digital communication during the 2010s and the methodologies and genres emerging and re-emerging in the field. Notably, researchers and professionals in this domain exhibit a persistent concern towards enhancing the quality of journalism, responding to changes in the craft and societal expectations throughout the analysed period.

Finally, this exploratory and descriptive analysis opens the way for more in-depth investigations, offering avenues to explore areas like the scientific profiles of the articles' authors, affiliations with universities and identifying organisations supporting such research endeavours through grants or subsidies.

7. Research limitations

This research serves as an exploratory analysis of scientific production on quality journalism. It intends to offer insights based on a bibliometric study, valuable for future studies in this domain.

However, certain limitations should be considered when interpreting the results. Although a widely recognised and comprehensive source, the choice of the Scopus database might introduce geographical and linguistic biases since it prioritises publications in English and may not fully cover relevant work in specific languages or regions insufficiently represented in the database. Additionally, the time frame from 1939 to 2022 may present a historical perspective, potentially excluding recent developments and emerging trends within journalism and quality, especially considering the rapid evolution of technology and journalistic practices.

The methodology used also presents challenges. Defining categories of analysis based on Scopus inclusions might limit the breadth of the research, excluding valuable contributions that may not fit exactly into these categories. Applying inclusion criteria, such as restricting articles to social science journals, may exclude relevant research from other disciplines that significantly contribute to understanding the topic. Moreover, while providing a quantitative view, reliance on bibliometric indicators may not fully encapsulate the complexity and depth of academic debates on journalism and quality.

The interpretation of the findings also has certain limitations. Despite rigorous analysis, interpreting complex data like bibliometric maps involves a level of subjectivity. The co-occurrences of keywords in clusters can be open to various interpretations, and different analysts might attribute different meanings to these relationships. Therefore, acknowledging these inherent limitations is crucial for a comprehensive assessment of the strength and applicability of the findings in this study concerning journalism and quality.

Translation: Anabela Delgado

Acknowledgements

Part of this work was supported by national funds through FCT – Fundação para a Ciência e Tecnologia, I.P., under the project UIDB/00736/2020.

References

Benedeti, C. A. (2009). *A qualidade da informação jornalística: Do conceito à prática*. Insular.

Blumler, J., & Gurevitch, M. (2002). *The crisis of public communication*. Routledge.

Boczkowski, P. J. (2005). *Digitizing the news: Innovation in online newspapers*. MIT Press.

Bogart, L. (2004). Reflections on content quality in newspapers. *Newspaper Research Journal*, *25*(1), 40–53. https://doi.org/10.1177/073953290402500104

Christofoletti, R. (2008). Implicações da concentração de mídia na qualidade do jornalismo: Ensaio de discussão e estudo de caso. *Interin*, *6*(2), 1–15.

Dagger, R. (1997). *Civic virtues: Rights, citizenship, and Republican liberalism*. Oxford University Press.

Ferreira, O. C. A. (2011). *Atributos de qualidade da informação* [Master's thesis, Universidade de Brasília]. Repositório Institucional da UNB. https://repositorio.unb.br/handle/10482/9501

Harbers, F. (2016). Time to engage: De Correspondent's redefinition of journalistic quality. *Digital Journalism*, *4*(4), 494–511. https://doi.org/10.1080/21670811.2015.1124726

Jenkins, H. (2006). *Convergence culture: Where old and new media collide*. NYU Press.

Kovach, B., & Rosenstiel, T. (2021). *The elements of journalism: What newspeople should know and the public should expect* (4th ed.). Crown.

Lacy, S., & Rosenstiel, T. (2015). *Defining and measuring quality journalism*. Rutgers School of Communication and Information.

McQuail, D. (2010). *McQuail's mass communication theory*. SAGE.

Meijer, I. C. (2001). The public quality of popular journalism: Developing a normative framework. *Journalism Studies*, *2*(2), 189–205. https://doi.org/189205.10.1080/14616700120042079

Meijer, I. C. (2013). Valuable journalism: A search for quality from the vantage point of the user. *Journalism*, *14*(6), 754–770. https://doi.org/10.1177/1464884912455899

Meyer, P. (2002). *Precision journalism: A reporter's introduction to social science methods*. Rowman & Littlefield Publishers.

Pinto, M., & Marinho, S. (2003, April 10–11). *A qualidade em jornalismo: Problematização e operacionalização do conceito* [Conference presentation]. I Congresso Luso-Brasileiro de Estudos Jornalísticos e ao II Congresso Luso-Galego de Estudos Jornalísticos, Porto, Portugal. https://hdl.handle.net/1822/997

Rosen, J. (2000). Questions and answers about public journalism. *Journalism Studies*, *1*(4), 679–683. https://doi.org/10.1080/146167000441376

Salaverría Aliaga, R., García Avilés, J. A., & Masip Masip, P. (2010). Concepto de convergencia periodística. In X. López & X. Pereira (Eds.), *Convergencia digital. Reconfiguración de los medios de comunicación en España* (pp. 41–64). Servicio de Publicaciones e Intercambio Científico.

Sánchez, J. L. M. (2015). *Emprendimiento e innovación en periodismo* (Vol. 3). Ediciones de la Universidad de Castilla La Mancha.

Sharifi, A., Simangan, D., & Kaneko, S. (2021). Three decades of research on climate change and peace: A bibliometrics analysis. *Sustainability Science*, *16*, 1079–1095. https://doi.org/10.1007/s11625-020-00853-3

Shoemaker, P. J., & Reese, S. D. (1996). *Mediating the message: Theories of influences on mass media content*. Longman.

Society of Professional Journalists. (2014). *SPJ code of ethics*. https://www.spj.org/ethicscode.asp

Tuominen, K., Talja, S., & Savolainen, R. (2005). Information literacy as a sociotechnical practice. *The Library Quarterly*, *75*(3), 329–345. https://doi.org/10.1086/497311

Waltman, L., & Noyons, E. (2018). Bibliometrics for research management and research evaluation. Universiteit Leiden.

Weaver, D. H., & Wilhoit, G. C. (2020). *The American journalist in the 1990s: US news people at the end of an era*. Routledge. https://doi.org/10.4324/9781003064152

Biographical Notes

Luisa del Carmen Martínez García has a doctorate in Audiovisual Communication and Advertising and a master's in Creative Documentary Theory and Practice from the Universitat Autònoma de Barcelona. She is a lecturer in the Department of Audiovisual Communication and Advertising and a collaborator at the Instituto de la Comunicación. She contributes to the Social Media master's programme at the Universitat Oberta. Her research areas include the digital communication ecosystem, disinformation and media representation of women, social media and gender.

ORCID: https://orcid.org/0000-0002-1304-5326

Email: luisa.martinez@uab.cat

Address: Carrer de la Vinya s/n. Bellaterra, Cerdañola del Vallés

Edson Capoano has a PhD in Communication and Culture from the Latin American Integration Programme (2013), a master's in Semiotics and a bachelor's in Social Communication from the Pontifícia Universidade Católica de São Paulo. He currently teaches journalism at the Escola Superior de Propaganda e Marketing. He conducted research stints at the Universities of Minho (2019-2023), Castilla-La Mancha (2017), Navarra (2015) and University of California San Diego (2012). Capoano is also the author of the books *Como Se Banca o Jornalismo?* (How Do You Pay Jornalism?; 2022), *La Jornada del Periodista* (The Journalist's Journey, 2017) and *A Natureza na TV* (The Nature of TV; 2015).

ORCID: https://orcid.org/0000-0001-6766-802X

Email: edson.capoano@espm.br

Address: Rua Álvaro Alvim, 123, Vila Mariana, São Paulo, SP, Brasil

Submitted: 15/04/2023 | Accepted: 13/11/2023

Comunicação e Sociedade, vol. 44, 2023, e023026
https://doi.org/10.17231/comsoc.44(2023).5231

Communication, Solidarity, and Cooperation in the Digital Era

Comunicação, Solidariedade e Cooperação na Era Digital

Víctor M. Marí Sáez
Departamento de Marketing y Comunicación, Universidad de Cádiz, Cadiz, Spain

Marí Sáez, V. M. (Ed.). (2022). *Comunicación solidaria en el capitalismo digital. Teorías, metodologías y prácticas*. Gedisa.

The presented collaborative work encompasses various pivotal ideas driven by the research team of the *Digicom2030*[1] project, which has included contributions from a diverse array of experts from both Spanish and Latin American contexts. Among the principal ideas, there is one embracing what could be defined as a *sociocentric perspective* on technopolitical processes (Marí Sáez, 2004; McQuail, 1983/1991), whereby the focus of social intervention is on emancipatory social processes, within which the uses and appropriations of digital technologies are inserted. This sociocentric perspective distances itself from the *technocentric perspective*, which suggests from a technological determinism standpoint that technology is at the heart of the processes of social change. Technocentrism is as seductive as it is inoperative in achieving the objective of generating structural change processes and has been described, from complementary perspectives, by the term *technological solutionism* (Morozov, 2013).

As proposed in the subtitle of this work, the book contains three main sections. The first section develops the key theoretical framework for understanding digital solidarity communication, incorporating new contributions that have emerged in this field in recent years. The second section reflects on the methodologies that contribute (or not) to academic and citizen intervention for more rigorous social research that is more attentive to the innovations that come from the digital aspect. The last part of the book includes a section of case studies that address digital citizen practices in the context of the COVID-19 pandemic, as well as the analysis of two non-governmental development organisations (NGOs) from a communicational perspective.

In more detail the book is divided into seven chapters. The first chapter, "Comunicación, Redes Sociales y Emancipación Social en el Capitalismo Digital" (Communication, Social Networks, and Social Emancipation in Digital Capitalism; Víctor

[1] *Digicom2030* is the acronym for the research project of the State Research Agency of Spain PID2019-106632GB-IOO entitled *Digital Solidarity Communication. Analysis of the Imaginaries, Discourses and Communicative Practices of NGOs in the Horizon of the 2030 Agenda*. For more information, please visit: https://digicom2030.uca.es/.

M. Marí Sáez), provides a global analysis of NGOs and their communicative practices, serving as an entryway to the entire work. This chapter begins by reviewing the diversity of theoretical approaches from which solidarity communication has been analysed in the Spanish context in recent years. It discusses labels such as "communication for solidarity and cooperation" (Erro Sala & Burgui, 2010), "empowerment and ecosocial communication" (Chaparro Escudero, 2009), or "transgressive communication for social change" (Nos Aldás et al., 2019). This plurality of labels has an ambivalent interpretation, as it indicates the richness of nuances in the field and certain epistemological weaknesses (Marí Sáez, 2021). The chapter reinterprets Spanish solidarity communication over the past 40 years to identify a dual reductionist tendency, even in the age of social media: an emphasis on a perspective of communication centred on the transmission of information and the predominance of the technocentric perspective mentioned earlier.

The second chapter, "Las Precarias Relaciones Entre Comunicación, Cooperación y Cultura. Una Mirada Panorámica Desde los Informes del Estado de la Cultura en España (2011-2021)" (The Precarious Relationships Between Communication, Cooperation and Culture. A Panoramic View From the State Reports of Culture in Spain [2011-2021]; Patricia Corredor Lanas), analyses, from a cultural perspective, the participation of civil society in the fields of communication and culture. The author concludes that a lost decade has passed regarding institutional and State support for cultural creation in Spain. The same can be said concerning gender equality in cultural matters, where significant glass ceilings still exist.

The third chapter, titled "Imaginarios Decoloniales de la Comunicación y Transiciones Ecosociales y Feministas en la Era Digital" (Decolonial Imaginaries of Communication and Ecosocial and Feminist Transitions in the Digital Age; Manuel Chaparro Escudero and Susana de Andrés del Campo), reflects on the anthropocentric, androcentric, and Eurocentric discourses of mass media from an alternative perspective. The authors propose other meanings of communication that favour an ecosocial and feminist transition. The chapter takes into account various tendencies that have gained importance in the field of alternative communication in recent years, such as degrowth approaches (Latouche, 2022) or the decolonial turn (Maldonado-Torres & Cavooris, 2017).

The fourth chapter, entitled "*Coolture*, Periodismos Mutantes y Soberanía Comunicacional" (*Coolture*, Mutant Journalisms, and Communication Sovereignty; Omar Rincón), proposes a fusion of the digital, new ethics (*coolture*), the digital revolution, and a type of journalism (described as mutant) that is not limited to the logic of hegemonic media but rather aims at a communication that appeals to emotions, discourses, and popular interventions.

The fifth chapter, "¿Cómo Se Investigan, Desde la Academia, las Prácticas Comunicativas de las Oenegés? Tendencias y Confluencias en la Era Digital" (How Are NGOs' Communicative Practices Investigated From the Academy? Tendencies and Confluences in the Digital Age; Miguel Vicente Mariño and Eva Campos Domínguez), addresses, from the perspective of research methodologies, the tensions and challenges of digital solidarity communication in the face of current topical phenomena such as big data. The authors acknowledge that research in the solidarity sector faces the challenge of incorporating new methodologies focused on analysing digital communication with greater intensity.

The sixth chapter, entitled "Análisis Crítico del Discurso Solidario y Marcos Gubernamentales. Estudio de Caso de Oxfam Intermón y de la Cruz Roja" (Critical Analysis of Solidarity Discourse and Government Frameworks. Case Study of Oxfam Intermón and Cruz Roja; Gérard Fernández Smith and Hanae Trola Skalli), analyses the messages of NGOs and their communication for development and social change. For this purpose, the authors implement a relevant methodology proposed by van Dijk (2003). Thus, the fieldwork allows for identifying solidarity discourses, ideological categories, and government frameworks of two of the most prominent and impactful NGOs at the national and international levels from a qualitative perspective.

The seventh and final chapter, titled "La Pandemia del Coronavirus en China y España y el Edu-Entretenimiento Como Estrategia Comunicativa Frente a la Desinformación" (The Coronavirus Pandemic in China and Spain and Edu-Entertainment as a Communication Strategy Against Misinformation; Yiheng Wang, Clara Martins do Nascimento, Víctor Mari, and José Berenguel Fernández), focuses on communicative initiatives from citizens during the COVID-19 pandemic through a case study. The analysis perspective is interesting insofar as it reveals how, in the first months of confinement (in 2020), the limits of institutional and governmental discourse to convey healthcare measures to the population were supplemented and completed by edu-communicative initiatives of healthcare launched by citizens created outside of any social organisation or public institution.

In each chapter and the book, the analyses are complemented by susceptible proposals for alternative action, which can be summarised into three points (pp. 24–30). Firstly, there is a necessity to think more and better about communicational critiques of digital capitalism by social organisations and academia. The frenetic activism, the prioritisation of the urgent over the important, or the excessive bureaucratisation are hindrances that restrain the construction of thought and action with sufficient transformative depth. Secondly, the excessive fragmentation of the *Ngo-isation of solidarity* (Álvarez, 2009; Petras, 1999) prevents the necessary and wanted social and political articulation of transformative action. Finally, in the face of the colonising advance of the commodification of communication, thinking of communication as a commons is an urgent alternative to be promoted. Working on this logic of global public goods allows, not by chance, a return to one of the original meanings that the word communication has had — the Latin *communis* — which has been distorted, blurred, or even lost over the years.

Acknowledgements

Agencia Estatal de Investigación de España (PID2019-106632GB-I00/AEI/10.13039/501100011033). IP: Víctor Manuel Marí Sáez and Unión Europea-Next Generation/Ministerio de Universidades de España (RD 289/2021 y UNI/551/2021), Universidad de Cádiz (UCA/ R155REC/2021).

References

Álvarez, S. (2009). Beyond NGO-ization? Reflections from Latin America. *Development*, *52*(2), 175–184. https://doi.org/10.1057/dev.2009.23

Chaparro Escudero, M. (2009). Comunicación para el empoderamiento y comunicación social. La necesaria creación de nuevos imaginarios. *Perspectivas de la Comunicación*, *2*(1), 146–158.

Erro Sala, J., & Burgui, T. (Eds.). (2010). *Comunicando para la solidaridad y la cooperación. Cómo salir de la encrucijada*. Foro de Comunicación, Educación y Ciudadanía.

Latouche, S. (2022). *La décroissance*. Humensis.

Maldonado-Torres, N., & Cavooris, R. (2017). The decolonial turn. In J. Poblete (Ed.), *New approaches to Latin American studies* (pp. 111–127). Routledge.

Marí Sáez, V. (Ed.). (2004). *La red es de todos: Cuando los movimientos sociales se apropian de la red*. Editorial Popular.

Marí Sáez, V. (2021). Pensar la comunicación para el cambio social en español aquí y ahora. *Arbor*, *197*(801), Article a615. https://doi.org/10.3989/arbor.2021.801005

McQuail, D. (1991). *Introducción a la teoría de la comunicación de masas* (P. Ducher, Trans.). Paidós. (Original work published 1983)

Morozov, E. (2013). *To save everything, click here. The folly of technological solutionism*. Public Affairs.

Nos Aldás, E., Farné, A., & Al-Najjar, T. (2019). Justicia social, culturas de paz y competencias digitales: Comunicación para una ciudadanía crítica global en la educación superior. *Revista Internacional de Educación para la Justicia Social*, *8*(1), 43–62. https://doi.org/10.15366/riejs2019.8.1.003

Petras, J. (1999). NGOs: In the service of imperialism. *Journal of Contemporary Asia*, *29*(4), 429–440. https://doi.org/10.1080/00472339980000221

van Dijk, T. (2003). *Ideología y discurso. Una introducción multidisciplinaria*. Ariel.

Biographical Note

Víctor Marí Saéz is a tenured professor at the University of Cádiz, Spain. He has a bachelor of arts in Information Sciences from the Complutense University of Madrid (Spain) and a PhD in Journalism from the University of Seville (Spain). He is the leader of the Comunicación y Ciudadanía Digital research group and the principal investigator of the project *Digital Solidarity Communication. Analysis of the Imaginaries, Discourses and Communicative Practices of NGOs in the Horizon of the 2030 Agenda* (2020–2024), PID2019-106632GB-IOO.

ORCID: https://orcid.org/0000-0003-4939-3776

Email: victor.mari@uca.es

Address: Universidad de Cádiz, Facultad de Ciencias Sociales y de la Comunicación, Campus de Jerez, Avenida de la Universidad nº 4, 11406 Jerez de la Frontera, Cádiz (España)

Submitted: 01/08/2023 | Accepted: 19/10/2023

Comunicação e Sociedade, vol. 44, 2023, e023014
https://doi.org/10.17231/comsoc.44(2023).4466

Digital Disconnection and Portuguese Youth: Motivations, Strategies, and Well-Being Outcomes

Patrícia Dias
Centro de Estudos de Comunicação e Cultura, Faculdade de Ciências Humanas, Universidade Católica Portuguesa, Lisbon, Portugal
Conceptualization, formal analysis, investigation, methodology, writing – original draft

Leonor Martinho
Faculdade de Ciências Humanas, Universidade Católica Portuguesa, Lisbon, Portugal
Conceptualization, formal analysis, investigation, methodology

Ana Jorge
Centro de Investigação em Comunicação Aplicada, Cultura e Novas Tecnologias, Escola de Comunicação, Arquitetura, Artes e Tecnologias da Informação, Universidade Lusófona, Lisbon, Portugal
Conceptualization, funding acquisition, methodology, project administration, supervision, validation, writing – review & editing

Abstract

As most individuals become digital media users, many struggle to find balance in such use. This study adds to emergent research on how digital disconnection experiences reflect on well-being (Nguyen et al., 2021; Radtke et al., 2022; Vanden Abeele, 2021) by focusing on motivations and strategies to disconnect from digital media, as well as on outcomes for well-being. We set out to understand teenagers who have voluntarily chosen to disconnect in the post-lockdown period in 2021. Our qualitative study included 20 participants from Portugal between 15 and 18 years old. Among those who consciously chose to disconnect from digital media, motivations arose from realizing that digital media was not bringing enough benefits for the amount of time that they took from users. Specific forms of digital media stood out as particularly problematic for young people, especially social media, but also videogames and pornography. This realization seems to be strongly influenced by the media and is evident in the vocabulary and associations used by our respondents. Social pressure is felt both as causing anxiety when they are connected and when they are disconnected through fear of missing out. However, the group provides support when they engage in a progressive disconnection together.

Radical disconnection is rare, especially during the pandemic, and can appear as a solution to a dramatic problem in young people's lives, but it can also be reverted. More often, participants attempted to self-regulate their use of digital when they acknowledged the advantages of those services as well as their drawbacks. This is not a linear process but rather filled with attempts and reversals as unexpected feelings such as boredom arise. When young people grow different leisure and social habits, they experience positive outcomes of disconnecting from the digital.

Keywords

digital, disconnection, youth, well-being, social media

Desconexão Digital e Jovens Portugueses: Motivações, Estratégias e Reflexos no Bem-Estar

Resumo

À medida que a maioria dos indivíduos se torna utilizador dos média digitais, muitos lutam para encontrar um equilíbrio nesse uso. Este estudo contribui para a pesquisa emergente sobre como as experiências de desconexão digital se refletem no bem-estar (Nguyen et al., 2021; Radtke et al., 2022; Vanden Abeele, 2021), concentrando-se nas motivações e estratégias para se desconectar dos média digitais, bem como nos resultados para o bem-estar. Propusemo-nos compreender os adolescentes que optaram voluntariamente por desligar no período pós-confinamentos, em 2021. O nosso estudo qualitativo incluiu 20 participantes entre os 15 e os 18 anos em Portugal. Entre aqueles que optaram conscientemente por se desconectar dos média digitais, as motivações surgiram da perceção de que esses meios não traziam benefícios suficientes para a quantidade de tempo que lhes tomavam. Algumas formas específicas de média digitais destacaram-se como particularmente problemáticas para os jovens, especialmente os média sociais, mas também os videojogos e a pornografia. Essa perceção parece ser fortemente influenciada pelos média, o que se evidencia no vocabulário e nas associações usadas pelos entrevistados. A pressão social é sentida como causadora de ansiedade quando estão conectados e quando estão desconectados por meio do *fear of missing out* (medo de perder o que se está a passar). No entanto, o grupo é fonte de apoio quando eles se envolvem numa desconexão progressiva em conjunto.

A desconexão radical é rara, principalmente em tempos de pandemia, e pode aparecer como solução para um problema dramático na vida dos jovens, mas também pode ser revertida. Mais frequentemente, os participantes tentaram autorregular o seu uso do digital, quando reconheceram as vantagens desses serviços, bem como as suas desvantagens. Este não é um processo linear, mas sim marcado por tentativas e reversões, à medida que surgem sentimentos inesperados, como o tédio. Quando os jovens desenvolvem diferentes hábitos sociais e de lazer, experimentam resultados positivos de desconexão do digital.

Palavras-chave

digital, desconexão, jovens, bem-estar, média sociais

1. Introduction

Contemporary society has been conceptualized, for the past three decades, as intertwined with the evolution and widespread adoption of digital media. These are always “at hand” (Levinson, 2004), and individuals are permanently connected (Katz & Aakhus, 2002), living *phygital* lives (Tolstikova et al., 2021). This permanent state of connectedness enables people to socialize, work, learn, and have fun anytime-anywhere, but it can also lead to anxiety, tiredness, and even addiction. As most individuals become users of digital media, a few are deliberately and consciously seeking non-use, undergoing “active, meaningful, motivated, considered, structured, specific, nuanced, directed, and productive” (Satchell & Dourish, 2009, p. 15) processes of disconnection, which may include media refusal (Portwood-Stacer, 2013), non-usage (Neves et al., 2015) and digital detox (Syvertsen & Enli, 2020). Wyatt (2003) argued that understanding non-users of digital media is as relevant and necessary to grasp the whole phenomenon as understanding users is.

The COVID-19 pandemic enhanced the use of digital media and changed users' perspectives on their benefits and drawbacks. Screen fatigue was experienced more intensely, and more users became aware of the warning signs of addiction (Bao et al., 2020). These experiences, combined with a renewed urge to "live life" after facing many restrictions during lockdown periods, enhanced the digital disconnection trend (Nguyen et al., 2021).

As more users weigh their options concerning their digital diet and struggle to find balance in their relationship with digital media, our study sets out to understand the experiences of Portuguese teenagers who have voluntarily chosen to disconnect.

2. Motivations to Disconnect

There is considerable research about the motivations that lead to digital disconnection. Early on, Wyatt et al. (2002) suggested that a sense of delusion, disappointment, or deception when comparing expectations about the internet with actual experiences and acknowledging online risks may lead to voluntary disconnection. Later, Eynon and Geniets (2012) organized the motivations for disconnecting uncovered by different studies into five categories: psychological (e.g., attitudes), cognitive (e.g., skills, literacy), physical (e.g., access), sociocultural (e.g., family context, cultural context) and material (e.g., socioeconomic status). In their study about Facebook abandonment, Baumer et al. (2013) identified reasons such as privacy protection, the possibility of data misuse by the platform, banality and time waste, negative impact on productivity, addiction, and external pressures. A broader study about disconnection from social networking sites (SNS) by Neves et al. (2015) identified three main reasons for disconnecting: low perceived usefulness of SNS, low willingness to participate in social practices perceived as negative (e.g., gossiping, social voyeurism, self-promotion), and self-perception as diverse from "mainstream" represented on SNS.

More recently, Syvertsen and Enli (2020) argued that a general sense of overload leads individuals to personal introspection, resulting in processes of digital disconnection. The authors suggest the concepts of "temporal overload" — when digital media users lose track of time and engage in excessive use; and "space overload" — when digital media users struggle to separate physical experiences from online experiences. These states lead to physical consequences, such as weight gain, sedentarism, depression, anxiety, and stress, which, when acknowledged, may trigger the will to change. Nguyen et al. (2021) found that adult users feel overwhelmed with information, stimuli, and tasks and question the impact of digital media on their efficiency and productivity. Aharoni et al. (2021), studying news avoidance, also concluded that overconsumption of digital media leads to fear of addiction, translating into media use reduction. Thus, processes of introspection lead to negative perceptions or evaluations about the impact of digital media in daily life, which motivate decisions to cut back on digital media use or disconnect entirely, temporarily or permanently (Magee et al., 2017).

3. Strategies of Digital Disconnection

Depending on the motivations to disconnect and on specific individual features and social circumstances, digital disconnection experiences can differ significantly. In 1995, Bauer observed that not using digital technologies may be an unintentional choice (e.g., lack of access, lack of digital skills) or an intentional choice, which the author labeled "active resistance".

Wyatt et al. (2002) suggested four profiles of non-users of digital media: resisters, "rejecters", excluded, and expelled. These profiles result from a matrix in which the crossing axes are voluntary *versus* involuntary actions and never having used *versus* quitting. Thus, both the excluded (involuntary non-users, socially or technically excluded) and the expelled (involuntary former users, due to cost, lack of access, lack of skills) are what the authors labeled "have nots", as their behavior is determined by external conditioning instead of deliberate choice. On the contrary, the other two profiles are the "want nots", as resisters (voluntary non-users) deliberately decided never to use digital media (in general, but usually partially, specific devices or platforms), and rejecters (former users) have been users in the past but willingly decided to quit or reduce.

Another proposal to characterize "non-users" is presented by Satchell and Dourish (2009), who draws on Rogers's (1983) work on technology adoption. Within this theory, laggards are those who have not yet adopted a certain technology. However, the authors argue that lagging behind in adoption differs greatly from deliberate and purposeful action. Seeking how such actions take form, Satchell and Dourish (2009) found five forms of non-adoption: disenchantment (evoking nostalgia to avoid change), displacement (users have substitute practices), disenfranchisement (lack of availability and accessibility of technologies), disinterest (users do now recognize worth in adopting a certain technology), and active resistance (users consider a certain technology negative or risky and fight its adoption).

Later, Neves et al. (2015) applied Wyatt et al.'s (2002) taxonomy to SNS and focused on resisters and rejecters. Their research led to suggesting two new categories: surrogate users (who do not have their own SNS accounts or profiles but occasionally use other people's access for specific actions); and potential converts (non-users who are considering starting to use SNS or reactivating their SNS accounts).

Although these studies shed light on disconnection experiences, the definition of non-user profiles relies more on the motivations leading to such decisions than on the actual strategies that non-users apply to avoid, reject, quit, or reduce digital media. Aranda and Baig (2018) offer insight into such strategies by suggesting that they are shaped by two main factors: the level of control (which varies from forced to voluntary disconnection) and the duration (from short to long term). The crossing of these axes results in a new matrix whose quadrants are four different digital disconnection strategies. In the forced quadrants, the "unplanned outage" includes users who are forced to stop using digital media for a short period (e.g., no Wi-Fi available, no battery on devices), while the "infrastructure constraints" includes people who experience disconnection during extended periods without their deliberate consent or desire (e.g., being at a place without digital infrastructures, accessibility restrictions). These users are permanently seeking to reconnect since it was not their voluntary decision to be disconnected. In the voluntary quadrants, "a short break" includes users who deliberately plan to disconnect for a short period, to rest or to focus on a specific task or situation (e.g., vacation with family, not being interrupted while working on something important or to meet a deadline), and "lifestyle choice" corresponds to a more consistent change of digital usage habits, which can be a radical disconnect or simply a limitation of screen time. In these cases, non-users are usually satisfied with their deliberate decisions and their impact on their lives. Self-regulation and self-management of digital activities are described in previous studies that do not focus specifically on digital disconnection. For example, Light and Cassidy (2014) found that Facebook users suspend and/or prevent connections to manage social relations and status, time spent online, and stress and anxiety.

Our research focuses precisely on deliberate non-usage and attempts to detail how this process occurs.

4. Digital Disconnection and Outcomes for Well-Being

Research about digital media's impact on users' lives is proliferous but inconclusive, as each study tends to focus more on the positive or the negative aspects of digital practices. These contradictory findings have made it challenging to determine the impact of digital media on the daily lives of their users, and a more holistic approach is needed to clarify this issue (Sewall et al., 2020). Another approach considers the impact of digital disconnection on the lives of voluntary non-users. Our research takes such an approach and focuses on well-being.

Seeking and achieving well-being is intrinsic to human life (Huta & Ryan, 2010). In general terms, two different approaches to well-being can be found since the Ancient Greek philosophy: to hedonism, well-being corresponds to brief moments when one experiences pleasure and/or happiness, whereas, in a eudaimonic perspective, well-being corresponds to the pursuit of fulfilling one's true potential throughout life (Henderson & Knight, 2012). In hedonism, measuring well-being is subjective, as it depends on individual perceptions of positive affect, life satisfaction and happiness (McCullough et al., 2000). On the contrary, in the eudaimonic view, well-being corresponds to reaching personal goals and achievements, culminating in being a fully functioning person. Within this perspective, Ryff (1989) suggests six criteria to measure psychological well-being: self-acceptance, positive relations with others, autonomy, environmental mastery, purpose in life, and personal growth. Keyes (1998) later argued that these dimensions concern solely the individual, but it is necessary to consider that individuals live integrated into social institutions and communities. Thus, the author adds five social dimensions of well-being: social integration (individuals feel that they are part of society), social acceptance (individuals feel accepted by other people), social contribution (individuals feel that they have value and are therefore able to contribute positively to society), social actualization (individuals believe that society has the potential to evolve and reach better states of well-being) and social coherence (individuals understand how society works).

More recent views on this issue have sustained that the hedonic and the eudaimonic views are not contradictory but complementary (Henderson & Knight, 2012; Huta & Ryan, 2010), a view we will adopt in our research.

There is emergent research on how digital disconnection experiences reflect on (physical and psychological) well-being. Vanden Abeele (2021) observes that digital connectivity is usually associated with the promise of improving daily life — more productivity, speed, efficiency, and personal time — while, in fact, many users struggle to balance the overwhelming feeling and pressure resulting from a permanent connection. The author refers to this ambivalence as "the mobile connectivity paradox" (Vanden Abeele, 2021, p. 934) and argues that acknowledging this paradox has led many users to change their digital practices, seeking a healthier and more balanced relationship with digital media. These changed behaviors take many forms, from total abstinence to reduction and self-regulation (Nguyen et al., 2021).

Baym et al. (2021) have found that short periods of digital abstinence, voluntary or not, raise awareness about the pros and cons of digital practices, which is beneficial to one's well-being. Nguyen et al. (2021) showed that disconnecting from SNS eases the burden of constantly being confronted with new information and the pressure to be permanently connected and respond. When digitally disconnected, the participants in their study experienced feelings of relief, peace, and quietness. These findings are consistent with a previous study by Brown and Kuss (2020) about a seven-day digital detox experience, which resulted in withdrawing from social comparison on social media, thus increasing psychological well-being. Anrijs et al. (2018) found that stress levels decrease during periods of digital detox from smartphones, thus finding evidence of a positive impact of digital disconnection on physical well-being as well. Turel et al. (2018) reached similar results regarding short periods of abstinence from SNS, thus revealing that this positive effect can be reached by good management of social media time and not only through radical disconnection. In fact, Hinsch and Sheldon (2013) had already found that taking short breaks from digital media decreased procrastination, which, in turn, increased life satisfaction — and, thus, well-being. Monge Roffarello and De Russis (2019) later reached similar conclusions, arguing that a good digital media management has better outcomes than radical disconnection. In their study, limiting the time spent online and taking short breaks increased attention span and the ability to focus. The authors stress that digital well-being apps can play an important role in self-regulating digital media use, helping users monitor their digital behavior and affording some self-regulatory tools such as blocking notifications. However, their research showed that these apps are efficient in reducing distractions for short periods, thus having a positive impact on study or work, but they fail to support the development of healthier digital practices in the long run. Nguyen et al. (2021) stress another positive outcome of digital disconnection: it frees time for exploring new interests and for self-care, thus leading to increased quality of life. In addition, the authors also found evidence of a positive impact on physical well-being, namely on sleep quality.

As there is evidence that excessive use of digital media can lead to addiction, Eide et al. (2018) explored the effects of abstinence and withdrawal from digital media, finding that in digital detox situations, withdrawal symptoms were stronger for individuals that used digital media more. Stieger and Lewetz (2018) also found that social media abstinence causes withdrawal symptoms, mainly craving and boredom. Wilcockson et al. (2019) showed that smartphone abstinence causes craving but stressed that other typical withdrawal symptoms, such as mood modification and increased anxiety, were not experienced, thus considering that digital detox experiences only cause slight withdrawal. Stieger and Lewetz (2018) claim that it is relevant to consider the effect of digital disconnection on the social dimension of well-being. Previous research has established that SNS have not significantly increased the size of social circles but have changed their landscape by facilitating the maintenance of weaker social ties (Dunbar, 2016). Despite social connections being generally weaker ties, they are important as they may be a source of social comparisons, a sense of belonging, and social recognition (Dunbar et al., 2015). Thus, being absent from the digital world or unavailable for a while may lead to strong social pressure to return, particularly to social media. Participants in Stieger and Lewetz's (2018) study reveal a sense of restlessness due to being left wondering about what is happening in the online world while they are offline, a sense of worry about other people possibly trying to reach them and being left without an answer, which fuels anxiety and leads to a reduction in psychological well-being. An increase in anxiety as a result of fear of missing out is also reported by Eide et al. (2018) and Vally and D'Souza (2019).

In general, research on the impact of digital disconnection on well-being shows how paradoxical it is, revealing evidence of being both detrimental and beneficial to well-being. Detrimental effects seem, however, to be mainly connected to the social dimension of well-being. Further research is needed to clarify this issue, and our research sets out to contribute to its understanding.

5. Methodology

5.1. Research questions

Our project aims to answer the following research questions (RQ):
RQ1: what motivates Portuguese teenagers to disconnect from digital media?
RQ2: how does this process of digital disconnection occur?
RQ3: how does digital disconnection impact their well-being?

5.2. Research Design

Our study is exploratory, using a qualitative method, with in-depth interviews as a data collection technique and thematic analysis as a data analysis technique. Regarding ethics, our study was approved by the University of Oslo's Ethics Committee, which developed the original study to which ours compared; informed consent was obtained from all participants and their legal guardians. Each participant chose the alias with which they wanted to be identified.

5.3. Sample

We intended to study digital disconnection among individuals between 15 and 18 years old who had already engaged in some sort of digital disconnection experience. Our sampling method consisted of announcing, through digital media channels of the main author's university (website and Instagram), that we were looking for volunteers of this age range who could describe their digital disconnection experiences. In addition, we contacted relevant partners such as youth associations, youth sports clubs, youth activities, and study centers by email and telephone, asking them to disseminate our request on their website and/or social media. Volunteers contacted us by email, and after ensuring they corresponded to our eliminatory criteria, we selected three initial participants. Then, we used the snowballing technique to find more young people who fit into the profiles we were seeking. We wanted to have some diversity, so we selected participants that would afford gender balance and participants of all ages within the considered age range. As we got more responses from boys and 17–18 year-olds, we specifically looked online for female participants between 15 and 16, offering a € 20 Amazon voucher as compensation. Informed consent was obtained from the participants, as they were considered autonomous to decide above 15. Our sample includes 20 participants, and this sample size was determined by the fact that digital disconnection experiences are not that common among youth, by the saturation found in our data at this point (Guest et al., 2006; Morse, 2015), and to abide by the same protocol used by other partners of this comparative project.

Table 1 gives us a few details about our sample of 20 participants, identified by alias chosen by themselves, here translated into English.

Alias	Age	Gender
Elizabeth	15	F
Margaret	15	F
Anna	16	F
Claire	16	F
Mathilda	16	F
Sophie	16	F
Barbara	17	F
Philippa	17	F
Agnes	17	F
Madeleine	18	F
James	16	M
Peter	16	M
Raul	16	M
Mathew	17	M
Theo	17	M
Anthony	18	M
David	18	M
Roger	18	M
Steven	18	M
Thomas	18	M

Table 1. *Characterization of the sample*

5.4. Data Collection Protocol

Our data collection technique was in-depth interviews, following a semi-structured script which addressed the following main topics: (a) background and socioeconomic status; (b) digital media use in everyday life; (c) perceptions and opinions on specific digital activities (e.g., social media, online gaming); and (d) digital disconnection experiences. The basis for this script was a translation of the data collection instrument used in a study conducted in the *Digitox* project, in Norway, with a few adaptations to the Portuguese context and additional questions. The interviews were conducted in the Spring and Summer of 2021. Because of the COVID-19 restrictions, interviews were conducted over video calls (Zoom). These conversations lasted, on average, one hour.

5.5. Data Analysis

All interviews were transcribed, and a summary of each interview was produced. We used thematic analysis (Boyatzis, 1998) as a data analysis technique, starting with a preliminary reading of the summaries. Next, a codebook was built, considering the literature review and the research questions — thus focusing on three main topics: motivations to disconnect, disconnection process, and disconnection outcomes. Table 2 displays the thematic categories and subcategories used in our coding. Then, coding was performed using MaxQDA software by one of the researchers. After the first round of coding, which was circulated and discussed among researchers, a second reading was performed to spot emerging relevant topics that were not included in the initial codebook. New themes were added, and the corresponding coding was conducted in a second round. This data analysis protocol enabled us to focus on our research questions while, at the same time, not missing relevant new topics.

First round of coding		Second round of coding
Categories	Subcategories	Themes
Motivations to disconnect	Negative perceptions of digital media	Excessive use
	Parents' pressure	Addiction
	Influencers' pressure	Anxiety
	Peer pressure	Dissatisfaction with self-image and/or lifestyle
	Media pressure	
Disconnection process	Procedures	Radical
	Difficulties	Progressive
		Self-regulatory
Disconnection outcomes	Positive for well-being	
	Negative for well-being	

Table 2. *Thematic coding categories and subcategories used*

6. Findings

6.1. Motivations to Disconnect

In our sample, five participants had experienced digital disconnection only because it was mandatory in and inherent to specific situations, such as sports competitions, scouts' camping, and summer camps. The other 15 had decided, consciously and voluntarily, to disconnect from digital media and were able to shed light on the motivations that led to this decision.

The main motivation was the realization that they could do something more useful or productive with their time instead of scrolling down social media or engaging in multiplayer games online. In the words of Madeleine (18 years old), "I was feeling really bad. Instagram was controlling my life. My time was not being well used"; and in the words of Anthony (18 years old), "I realized I was wasting my time". This realization was usually associated with something lost, such as a decline in academic performance, relationships that drifted apart, abandoning extra-curricular activities, or spending lesser time with their family.

In some cases, the perception of excessive use of digital media and its negative impact on their lives is so strong that they perceive and describe themselves as addicts. For example, Sophie (16 years old) says: "Instagram's algorithm is so well designed that it showed me exactly what I like to see, so I stayed online for very long periods without even realizing time was going by".

For most participants, this was a progressive and cumulative process, but many describe defining moments in which they realized they needed to change. For Anthony, it was a day he missed school because he was feeling sick and spent the whole day in bed using his smartphone without even eating. That was the first time he saw himself as an addict. For Margaret (15 years old), it was when her mother sent her a message through WhatsApp asking her to come and have dinner with her family because that was the best way to get her attention.

Another important motivation is identifying social media as the cause of anxiety. If they are not connected, many participants describe feeling fear of missing out, as they cannot follow what is happening in their circle of friends, with the influencers and brands they like, and the world in general. Theo (17 years old) gives us an example:

> sometimes I'm home, and my friends post an Instastory of someone falling off their bike or fighting at a club, and they are laughing; they seem to be having so much fun. I feel bad for missing it. And they message me inviting me to meet them because they are having so much fun, so I feel social pressure.

However, being constantly connected also generates anxiety stemming from social comparison. They feel excluded if others are engaging in some activity they were not invited to, feel depressed if they cannot uphold the lifestyle of friends and influencers, and feel ashamed about their body and image if it doesn't meet the standards of Instagram or TikTok. Mathilda (16 years old) gives us her testimony:

> mentally, being on Instagram was torture because I was always comparing myself to others. If some of my friends went out and seemed to be having fun, I would feel bad because I was not having fun, or I would feel sad because I was not invited. I compared myself to others, and I always felt worse. I would see influencers leading dream lives, and I was just at school. And then I felt miserable all day.

Creating content is another source of anxiety as, if you don't post, you become irrelevant, and if you post, waiting for others' reactions and validation can be very stressful, as well as dealing with indifference or negative comments. Agnes (17 years old) says: "before, I was always seeking the attention and approval of others on Instagram. And I felt really bad when I didn't get it". While falling into the traps of social comparison on social media, they also develop a critical view of it. They are aware of the lack of authenticity and the superficiality of the carefully curated and constructed content that is particularly characteristic of Instagram. For example, Theo states:

> Instagram is an illusion. People only post their best photos; they build a perfect image of themselves, so different from what is beneath them. Most people don't realize this. Girls feel so bad about their bodies, and boys do as well. It's awful. Friends have asked me for help because they were afraid they would become anorectic or bulimic trying to be like other girls on Instagram.

They struggle to acknowledge many of the downsides of the digital world and the social pressure — particularly peer pressure — to continue to be a part of it. Anthony shares how he coped with this:

> There was a stage in which I uninstalled Instagram and was completely cut out of my circle of friends. They met, and I was left out. I also uninstalled WhatsApp, and I was totally isolated. As I cared about my friends, I decided to use a condensed version of Instagram, Threads. And I turned off WhatsApp notifications and only check it in the morning, at lunch, and night, for five minutes each time.

For some participants, experiencing mandatory digital disconnection experiences such as the cases we described above, or vacations at places without internet connection, was so positive that they decided to make some changes in their digital practices. In these cases, the main motivation for disconnecting was not the realization that excessive use of digital media was negative for them but, instead, the realization that digital disconnection periods were positive for them.

6.2. The Process of Digital Disconnection

From our participants' experiences, we were able to identify two main trends: disconnecting radically or self-regulating their digital practices. Those who disconnect radically abandon digital practices that they consider negative for them, while self-regulators focus more on cutting back on the time they spend online. Both groups find sticking to their decisions challenging, face setbacks, and struggle with contradictions and impulses. In our sample, there were four radical disconnectors — all boys; four progressive disconnectors — two boys and two girls; and seven self-regulators — two boys and five girls. The average age of the (radical and progressive) disconnectors tends to be slightly higher than that of self-regulators.

The radical disconnectors usually identify a specific practice as the source of their addiction and/or anxiety and decide to abandon it. The most common are social media — particularly Instagram — but also online multiplayer gaming and pornography. Some "went cold turkey" and uninstalled the social media apps on their phones; some even deleted their profiles so there was no point in installing the apps again, and others sold their consoles. Others preferred to cut down progressively, particularly on social media, and set progressive goals such as dedicating one hour a day, 45 minutes the next week, half an hour, and so on, until they feel capable of uninstalling. The progressive process is a daily battle, and more vulnerable to peer pressure, as Roger (18 years old) shares:

> my friends from school would say "Hey, I DMed [sent a direct message] you on Instagram, and you didn't answer? Why aren't you answering?" and I tried to explain to them what I was trying to do and what I was going through. Not all of them understood.

A common challenge is replacing a digital activity with another. For example, Madeleine abandoned Instagram and started using YouTube more. Anthony was able to quit watching online pornography but now uses an app to meditate. To face this challenge, other participants, such as Barbara, James and David started engaging more in offline activities such as sports, learning how to play an instrument, or simply hanging out with friends face to face. The progressive disconnectors experience more ups and downs in their process and are more prone to relapsing into their previous habits.

The self-regulators share more positive views on the digital world than the radical disconnectors. The first acknowledge risks and opportunities, while the latter tend to focus on the "dark side" of the internet. Thus, self-regulators believe it is possible to reach a point of balance in which they can harvest the advantages of the online world — for learning, studying, and connecting —, while at the same time coping with the risks. They tend to focus more on managing their time online, while the radical disconnectors are more worried about what they do online. Self-regulators also tend to engage in progressive disconnection processes, but their goal is not to completely disconnect but rather to reach an amount of time that they find acceptable or appropriate to dedicate to online activities.

If peer pressure is the main cause of setbacks and relapses — as David (18 years old) tells us: "sometimes I am talking to someone on Instagram, and my daily 15 minutes are over, and I stay for a bit longer, and then I feel so guilty, I should have used my online time better" —, it can also be a source of motivation and help. Our participants agree that undergoing this disconnection journey had an impact on their circle of friends. Some relationships drifted apart because the easy online connection was no longer available, while others were reinforced by the commitment and effort it took to meet face to face. Our participants became closer to friends who were also struggling with excessive digital media use. They formed informal support groups that became safe spaces for discussing concerns, guilt, difficulties, and possible solutions. Anthony shared his experience:

> this process became easier because I sought friends to whom I could talk about what I was going through. If we are struggling with difficulties in sticking to our goals, it's much easier to overcome them as a group than if we are alone. Sometimes I don't know if what I am feeling is normal or not, and it helps to discuss it with others and learn from their experiences.

In our participants' discourse, their choice of vocabulary was very vivid. They talk about "addiction", "triggers", "dopamine rush", "withdrawal", "relapses", "failure", and "guilt". Many see themselves as addicts but are trying to cope with the problem on their own and relying on the help of friends struggling with the same problem. They haven't sought the help of parents, teachers, or professionals because they see the adults around them struggling with the same addiction, even less aware of it than they are. For example, Theo describes his household in the following way:

> my parents are also addicted to digital media. They spend so much time on their smartphones! Sometimes I watch a soccer game with my dad on TV, and he is on Facebook instead of paying attention to the game. My mum texts while she is watching her favorite soap opera. And my sister is the worst! She is always on TikTok.

Regardless of being more or less successful in reaching their disconnection goals, our data revealed that young people are struggling while trying to cope with the change they want to make in their lives.

6.3. Outcomes of Digital Disconnection

In general, our participants state that their lives improved because they decided to disconnect from the digital world. However, these improvements are also felt after a while of compliance because the immediate effect is negative.

At the beginning of their disconnection journey, they feel anxious, particularly those who disconnect from group activities such as social media and online multiplayer gaming. They lose track of what is going on in their circle of friends, and some of them even feel guilty when their friends don't understand their decision and complain because they are not available anymore. Also, they start to be excluded from invitations and arrangements made exclusively online. Mathilda describes her experience:

> sometimes, I miss knowing what my friends are up to, what they do outside school. Are they interesting? What do they like? What do they do in their free time? Now I have no idea. I used social media to find common ground, to have topics to start conversations, and I had to learn how to connect with people in other ways.

However, some participants consider that, in the long run, they now have a more authentic and solidary group of friends. They believe that the connections they lost were superficial, and those who made an effort to stay in touch and hang out offline are their true friends. Anthony gives us his perspective:

> I have lost touch with a lot of people, but I realized that only happened with people that were not important in my life. I occasionally liked their stories. Does that matter? If someone is important to me, I will call that person. And if I am important to someone, that person will call me. And when we meet, we have deeper conversations; it's almost magical. I have realized who my true friends are, and that has made an incredible difference in my life.

Boredom was another problem they reported dealing with at the beginning of their disconnection journey. They were so accustomed to dedicating their free time — and even beyond that — to online activities — particularly social media, that they didn't know what to do with the free time they gained or how to entertain themselves. Roger told us about this:

> Before, whenever I was bored, I would turn immediately to my smartphone and scroll down social media. In response to boredom, my brain immediately sought a dopamine rush; I clicked and got it automatically. I had to learn how to deal with boredom.

This challenge was overcome by dedicating the newly released time to activities they had neglected, such as studying, romantic relationships, and even family. In other cases, they finally ran out of the "I don't have time" excuse and gained motivation to pursue forsaken projects and goals, such as starting a new sport, learning to play an instrument, and reading.

Once the time previously dedicated to online activities was replaced with others, and their circle of friends stabilized, the positive outcomes became more evident. David improved his grades and is now on the right track to fulfilling his dream of becoming a doctor, and considers that "before, I had 'brain fog', I couldn't concentrate on anything. I was just there, and my thoughts controlled me. Now I can focus on classes, without any problems". He also emphasizes a sense of accomplishment: "now I use my time much better. I don't procrastinate doing nothing on my smartphone anymore". Barbara (17 years old) learned how to play the guitar. Anthony improved his relationship with his girlfriend and motivated her to start her own digital disconnection journey. Agnes now values spending some evenings watching television with her family instead of alone in her room.

Particularly the girls experienced improvements in their self-esteem and self-image acceptance. Philippa (17 years old) gives us her testimony:

> I saw other girls on Instagram, and I thought, "I wish I were as pretty as her", and I felt unhappy about my physical appearance. Now I realized I was focusing just on the positive aspects of others and on the negative aspects of myself. Now I try to enjoy my life offline and feel happier.

By distancing themselves from the constant social comparison that social media triggers and questioning the beauty standards that emerge in those platforms, they now feel better about themselves, their bodies, and their lifestyles.

Our participants emphasize that their digital disconnection processes were important self-knowledge and self-improvement journeys. Being successful in reaching the goals they have set for themselves also affords a sense of accomplishment and self-fulfillment, as David describes:

> I feel proud; I feel that I am holding my commitment if I use digital media less. That's how I feel when I don't use the smartphone. And if I use it for too long, I feel guilty because I wasted time that I could have used better, and I didn't study as much as I should have. Not using the smartphone helps me make the best of my time and feel good about myself.

Philippa believes she is now more authentic and lives a more real life. Madeleine finds fulfillment in her disconnection progressive achievements and believes she is now more autonomous, critical, and prepared to become an adult. Margaret is very committed to setting a good example for her younger siblings. Anthony is thinking about how so many young people could benefit from digital disconnection and is trying to find a way of sharing his experience and positively impacting the world without resorting to digital media.

7. Discussion

Among the various motivations to disconnect from social media discussed in the literature, our study highlights, on the one hand, the importance of the usefulness of time and productivity for teenagers. This issue has already been identified by Nguyen et al. (2021) in adults and framed within the contemporary neoliberal and capitalist ideology associated with labor, user-generated content, and the use of social media (Fuchs, 2018). On the other hand, issues such as privacy protection and the possibility of data misuse by digital platforms, as mentioned by Baumer et al. (2013), are absent from our data, indicative of teenagers' lack of media literacy (Pereira & Brites, 2019).

Our research further reveals that negative perceptions about one's use of social media are not only a common root to diverse motivations for digital disconnection (Magee et al., 2017) but also, for our sample of teenagers, associated with a sense of lack of self-control, as Aranda and Baig (2018) had already pointed out, as all of them describe themselves as social addicts, at some point of their lives.

One overarching feature of the digital disconnection phenomenon is, therefore, struggle. Our sample struggles with forming a perception about their own use of social media, as they acknowledge both benefits and downsides to their social media practices. For example, considering social media scrolling a waste of time contradicts fear of missing out. The motivation to disconnect emerges from a tipping of this scale that balances contradictory perceptions about the impact of digital media on one's life to the negative side.

Our sample of "rejecters" (Wyatt et al., 2002) struggles with finding a digital disconnection strategy that works, ranging from radical disconnection to self-regulation, with digital breaks. Self-regulation is the predominant strategy, aligned with Monge Roffarello and De Russis' (2019) argument that self-regulation and management have better outcomes than radical disconnection. Regardless of each option, they take steps forward and backward, noticing achievements and relapses, habits and changes. These teenagers feel that asking adults — parents or teachers — for help is useless, as adults are also perceived as digital addicts. Instead, they rely on peers with whom they share a digital disconnection journey for support.

Finally, they struggle with evaluating the impact of their decisions on their lives. Most of our participants report improvements in their lives as a result of their digital disconnection — focus and learning (Vanden Abeele, 2021), health and well-being (Baym et al., 2021), self-image and self-esteem (Brown & Kuss, 2020), genuine and meaningful friendships with peers. However, they also report problems — anxiety and social exclusion (Nguyen et al., 2021) and boredom (Stieger & Lewetz, 2018). Overall, our in-depth interviews revealed that digital disconnection is a process that negatively impacts the well-being of those who choose to undergo it during an initial adaptation period but has a significant positive impact on those who are able to overcome the hardest earliest times. However, some participants also stress that it is an ongoing process with successive challenges.

We acknowledge the limited size of our sample and the fact that our method was based on self-reported data and thus vulnerable, on the side of researchers, to interviewer bias (the influence that the interviewer's personal characteristics and way of interacting, including words used and information disclosed about the study, can have on the interviewees) and confirmation bias (tendency, in data analysis, to interpret data in a way that confirms preexisting beliefs or hypotheses); and to social desirability bias (participants' tendency to answer in a way they believe is socially accepted and/or valued, or that they believe will please the researcher), on the side of participants (Morse, 2015). Nevertheless, our study was the first approach to a topic that had not been studied in the Portuguese context yet and was able to point out directions for further research, as is the purpose of exploratory research (Creswell, 2009).

8. Conclusion

Our study with 20 young people between 15 and 18 years old who had already engaged in digital disconnection experiences revealed a variety of motivations, strategies, and well-being outcomes. Among those who consciously chose to disconnect from digital media, motivations arose from realizing that digital media was not bringing enough benefits for the amount of time they took from users. Specific forms of digital media stood out as particularly problematic for young people, especially social media. This realization seems to be strongly influenced by media discourses on the issue and is evident in the vocabulary and associations used by our respondents related to "addiction".

Radical disconnection is rare, especially during the pandemic, and can appear as a solution to a dramatic problem in young people's lives, but it can also be reverted. More often, participants attempted to self-regulate their use of digital when they acknowledged the advantages of those platforms, as well as their drawbacks. This is not a linear process but rather filled with attempts and reversals as unexpected feelings such as boredom arise. When young people grow different leisure and social habits, they experience positive outcomes of disconnecting from the digital.

The study's contribution stems from the focus on young people, particularly teenagers mastering their self-regulation mechanisms and learning how to balance their relationship with family and peers, but also social institutions like school and the media. The fact that issues concerning how algorithmic digital platforms work, datafication, and commercial exploitation were not brought about by our participants points out the need to develop the media literacy of Portuguese teenagers so that they can understand better how contemporary social media work and how they can cope with them in an informed, critical, responsible, and safe manner. Additionally, the realization that teenagers struggle in their digital disconnection journeys and not turning to adults for help is also a concern. It entices adults to reflect on their own digital media use critically and challenges the academia, policymakers, and caretakers of children and teenagers to find new ways to support them in this dimension of their development.

The social diversity of the sample was not as high as we intended it to be. This can be listed as a limitation of the study, as experiences from teenagers from lower socioeconomic status might indicate more of the struggles young people go through in using and interrupting their use of digital media. Future research can look more deeply socioeconomic differences among young people.

Acknowledgments

This study was conducted by Dis/Connect, supported by EEA Grants Bilateral Relations (FBR_OC1_69_COFAC).

References

Aharoni, T., Kligler-Vilenchik, N., & Tenenboim-Weinblatt, K. (2021). "Be Less of a Slave to the News": A texto-material perspective on news avoidance among young adults. *Journalism Studies*, *22*(1), 42–59. https://doi.org/10.1080/1461670X.2020.1852885

Anrijs, S., Bombeke, K., Durnez, W., Damme, K. van, Vanhae-Lewyn, B., Smets, E., Cornelis, J., de Raedt, W., Ponnet, K., & de Marez, L. (2018). MobileDNA: Relating physiological stress measurements to smartphone usage to assess the effect of a digital detox. In C. Stephanidis (Ed.), *HCI International 2018 – Posters' Extended Abstracts* (pp. 356–363). https://doi.org/10.1007/978-3-319-92279-9_48

Aranda, J. H., & Baig, S. (2018). Toward "JOMO": The joy of missing out and the freedom of disconnecting. In *MobileHCI 2018 - Beyond Mobile: The Next 20 Years - 20th International Conference on Human-Computer Interaction with Mobile Devices and Services, Conference Proceedings* (pp. 1–8). Association for Computing Machinery. https://doi.org/10.1145/3229434.3229468

Bao, H., Cao, B., Xiong, Y., & Tang, W. (2020). Digital media's role in the COVID-19 pandemic. *Journal of Medical Internet Research*, *8*(9), e20156. https://doi.org/10.2196/20156

Bauer, M. (Ed.). (1995). *Resistance to new technology: Nuclear power, information technology and biotechnology*. Cambridge University Press.

Baumer, E. P. S., Adams, P., Khovanskaya, V. D., Liao, T. C., Smith, M. E., Sosik, V. S., & Williams, K. (2013). Limiting, leaving, and (re)lapsing: An exploration of Facebook non-use practices and experiences. In S. Bødker, S. Brewster, P. Baudisch, M. Beaudouin-Lafon, & W. Mackay (Eds.), *Proceedings of the SIGCHI Conference on Human Factors in Computing Systems* (pp. 3257–3266). Association for Computing Machinery. https://doi.org/10.1145/2470654.2466446

Baym, N. K., Wagman, K. B., & Persaud, C. J. (2020). Mindfully scrolling: Rethinking Facebook after time deactivated. *Social Media + Society*, *6*(2), 1–10. https://doi.org/10.1177/2056305120919105

Boyatzis, R. (1998). *Transforming qualitative information: Thematic analysis and code development*. Sage.

Brown, L., & Kuss, D. J. (2020). Fear of missing out, mental wellbeing, and social connectedness: A seven-day social media abstinence trial. *International Journal of Environmental Research and Public Health*, *17*(12), 1–18. https://doi.org/10.3390/ijerph17124566

Creswell, J. W. (2009). *Research design: qualitative, quantitative, and mixed methods approaches*. Sage.

Dunbar, R. (2016). Do online social media cut through the constraints that limit the size of offline social networks? *Royal Society Open Science*, *3*(1), Article 150292. https://doi.org/10.1098/rsos.150292

Dunbar, R., Arnaboldi, V., Conti, M., & Passarella, A. (2015). The structure of online social networks mirrors those in the offline world. *Social Networks*, *43*, 39–47. https://doi.org/10.1016/j.socnet.2015.04.005

Eide, T. A., Aarestad, S. H., Andreassen, C. S., Bilder, R. M., & Pallesen, S. (2018). Smartphone restriction and its effect on subjective withdrawal related scores. *Frontiers in Psychology*, *9*, Artigo 1444. https://doi.org/10.3389/fpsyg.2018.01444

Eynon, R., & Geniets, A. (2012). *On the periphery? Understanding low and discontinued Internet use amongst young people in Britain. Report for the Nominet Trust*. SSRN.

Fuchs, C. (2018). Neoliberalism, capitalist restructuring, and the contestation over social media platforms. *International Journal of Communication*, *12*, 2922–2944. https://doi.org/10.1080/21670811.2018.1496745

Guest, G., Bunce, A., & Johnson, L. (2006). How many interviews are enough? An experiment with data saturation and variability. *Field Methods*, *18*(1), 59–82. https://doi.org/10.1177/1525822X05279903

Henderson, L., & Knight, T. (2012). Integrating the hedonic and eudaimonic perspectives to more comprehensively understand wellbeing and pathways to wellbeing. *International Journal of Wellbeing*, *2*(3), 196–221. https://doi.org/10.5502/ijw.v2i3.3

Hinsch, C., & Sheldon, K. M. (2013). The impact of frequent social internet consumption: Increased procrastination and lower life satisfaction. *Journal of Consumer Behaviour*, *12*(6), 496–505.

Huta, V., & Ryan, R. M. (2010). Pursuing pleasure or virtue: The differential and overlapping well-being benefits of hedonic and eudaimonic motives. *Journal of Happiness Studies*, *11*(6), 735–762. https://doi.org/10.1007/s10902-009-9171-4

Katz, J. & Aakhus, M. (2002). *Perpetual contact: Mobile communication, private talk, public performance*. Cambridge University Press.

Keyes, C. L. M. (1998). Social well-being. *Social Psychology Quarterly*, *61*(2), 121–140.

Levinson, P. (2004). *Cellphone: The story of the world's most mobile medium and how it has transformed everything!* Saint Martin's Press.

Light, B., & Cassidy, E. (2014). Strategies for the suspension and prevention of connection: Rendering disconnection as socioeconomic lubricant with Facebook. *New Media & Society*, *16*(7), 1169–1184. https://doi.org/10.1177/1461444814544000

Magee, R. M., Agosto, D. E., & Forte, A. (2017). Four factors that regulate teen technology use in everyday life. In *Proceedings of the ACM Conference on Computer Supported Cooperative Work, CSCW* (pp. 511–522). Association for Computing Machinery. https://doi.org/10.1145/2998181.2998310

McCullough, G., Huebner, E. S., & Laughlin, J. E. (2000). Life events, self-concept, and adolescents' positive subjective well-being. *Psychology in the Schools*, *37*(3), 281–290.

Monge Roffarello, A., & De Russis, L. (2019). The race towards digital wellbeing: Issues and opportunities. In *Proceedings of the 2019 CHI Conference on Human Factors in Computing Systems* (pp. 1–14). Association for Computing Machinery. https://doi.org/10.1145/3290605.3300616

Morse, J. M. (2015). Critical analysis of strategies for determining rigor in qualitative inquiry. *Qualitative Health Research*, *25*(9), 1212–1222. https://doi.org/10.1177/1049732315588501

Neves, B. B., de Matos, J. M., Rente, R., & Martins, S. L. (2015). The 'non-aligned': Young people's narratives of rejection of social networking sites. *Young*, *23*(2), 116–135. https://doi.org/10.1177/1103308815569393

Nguyen, M. H., Hargittai, E., Fuchs, J., Djukaric, T., & Hunsaker, A. (2021). Trading spaces: How and why older adults disconnect from and switch between digital media. *Information Society*, *37*(5), 299–311. https://doi.org/10.1080/01972243.2021.1960659

Pereira, S., & Brites, M. J. (2019). Media literacy in Portuguese adolescents: Results from a national survey. *Journal of Media Literacy Education*, *11*(2), 1–19. https://doi.org/10.23860/JMLE-2019-11-2-1

Portwood-Stacer, L. (2013). Media refusal and conspicuous non-consumption: The performative and political dimensions of Facebook abstention. *New Media & Society*, *15*(7), 1041–1057. https://doi.org/10.1177/1461444812465139

Radtke, T., Apel, T., Schenkel, K., Keller, J., & von Lindern, E. (2022). Digital detox: An effective solution in the smartphone era? A systematic literature review. *Mobile Media and Communication*, *10*(2), 190–215. https://doi.org/10.1177/20501579211028647

Rogers, E. M. (1983). *Diffusion of innovations*. Free Press.

Ryff, C. D. (1989). Happiness is everything, or is it? Explorations on the meaning of psychological well-being. *Journal of Personality and Social Psychology*, *57*(6), 1069–1081.

Satchell, C., & Dourish, P. (2009). Beyond the user. In J. Kjeldskov, J. Paay, & S. Viller (Eds.), *Proceedings of the 21st Annual Conference of the Australian Computer-Human Interaction Special Interest Group on Design: Open 24/7 - OZCHI '09* (pp. 9–16). Association for Computing Machinery. https://doi.org/10.1145/1738826.1738829

Sewall, C. J. R., Bear, T. M., Merranko, J., & Rosen, D. (2020). How psychosocial well-being and usage amount predict inaccuracies in retrospective estimates of digital technology use. *Mobile Media and Communication*, *8*(3), 379–399. https://doi.org/10.1177/2050157920902830

Stieger, S., & Lewetz, D. (2018). A week without using social media: Results from an ecological momentary intervention study using smartphones. *Cyberpsychology, Behavior, and Social Networking*, *21*(10), 618–624. https://doi.org/10.1089/cyber.2018.0070

Syvertsen, T., & Enli, G. (2020). Digital detox: Media resistance and the promise of authenticity. *Convergence*, *26*(5–6), 1269–1283. https://doi.org/10.1177/1354856519847325

Tolstikova, I. I., Ignatjeva, O. A., Kondratenko, K. S., & Pletnev, A. V. (2021). Generation Z blended learning: The technology of opportunity. *International Journal of Open Information Technologies*, *9*(12), 90–98.

Turel, O., Cavagnaro, D. R., & Meshi, D. (2018). Short abstinence from online social networking sites reduces perceived stress, especially in excessive users. *Psychiatry Research*, *270*, 947–953. https://doi.org/10.1016/j.psychres.2018.11.017

Vally, Z., & D'Souza, C. G. (2019). Abstinence from social media use, subjective well-being, stress, and loneliness. *Perspectives in Psychiatric Care*, *55*(4), 752–759. https://doi.org/10.1111/ppc.12431

Vanden Abeele, M. M. P. (2021). Digital wellbeing as a dynamic construct. *Communication Theory*, *31*(4), 932–955. https://doi.org/10.1093/ct/qtaa024

Wilcockson, T. D. W., Osborne, A. M., & Ellis, D. A. (2019). Digital detox: The effect of smartphone abstinence on mood, anxiety, and craving. *Addictive Behaviors*, *99*. https://doi.org/10.1016/j.addbeh.2019.06.002

Wyatt, S. (2003). Non-users also matter: The construction of users and non-users of the Internet. In N. Oudshoorn & T. Pinch (Eds.), *How users matter: The co-construction of users and technology* (pp. 67–79). MIT Press.

Wyatt, S., Thomas, G., & Terranova, T. (2002). They came, they surfed, they went back to the beach: Conceptualising use and non-use of the Internet. In S. Woolgar (Ed.), *Vistural society? Technology, cyberpole, reality* (pp. 23–40). Oxford University Press.

Biographical Notes

Patrícia Dias holds a PhD in communication sciences. She is assistant professor at Universidade Católica Portuguesa and a researcher at Research Centre for Communication and Culture. Her main research interests are the use of digital media by children and also within organizational communication, marketing, and branding. She is the author of several publications about the social impact of digital media and the use of smartphones.

ORCID: https://orcid.org/0000-0001-7948-4439
Email: pdias@ucp.pt
Address: Centro de Investigação em Comunicação e Cultura, Universidade Católica Portuguesa, Palma de Cima, 1649-023 Lisboa, Portugal

Leonor Martinho holds a master in communication sciences by Universidade Católica Portuguesa. Leonor is interested in digital disconnection and wellbeing. She collaborated with the *Dis/Connect* project.

ORCID: https://orcid.org/0009-0005-3953-9649
Email: nonocvm@gmail.com
Address: Faculdade de Ciências Humanas, Universidade Católica Portuguesa, Palma de Cima, 1649-023 Lisboa, Portugal

Ana Jorge is research coordinator at Centre for Research in Applied Communication, Culture, and New Technologies, and associate professor at Universidade Lusófona. She holds a communication sciences PhD from the NOVA University of Lisbon. Ana has published extensively on children, youth and media, celebrity and influencer culture,

digital culture, and communication. She has co-edited *Digital Parenting* (Nordicom, 2018) and *Reckoning With Social Media* (Rowman & Littlefield, 2021).

ORCID: https://orcid.org/0000-0002-4069-6212

Email: ana.jorge@ulusofona.pt

Address: CICANT, Universidade Lusófona, Campo Grande, 376, 1749-024 Lisboa

Submitted: 12/12/2022 | Accepted: 29/04/2023

Comunicação e Sociedade, vol. 44, 2023, e023017
https://doi.org/10.17231/comsoc.44(2023).4612

Theory of Technomagic: Spells, Ecstasy and Possessions in Digital Culture

Vincenzo Susca
Laboratoire d'Études Interdisciplinaires sur le Réel et les Imaginaires Sociaux,
Université Paul-Valéry Montpellier 3, Montpellier, France

Abstract

The rituals, ceremonies and effervescence of the sacred manifest themselves in digital culture not only through the proliferation of new religious cults. They do so through the online actualisation of traditional religious forms but also the spiritual elevation of objects (Houtman & Meyer, 2012), practices (Carolyn, 2014) or ephemeral, playful and dreamlike images (Susca, 2016). In most cases, they involve figures that evoke the most sensitive and immaterial aspects of experience: its flesh (Esposito, 2004; Henry, 2000) and its imaginary (Durand, 1992). This is the actualisation of what Durkheim (2008) called the "social divine". We are thus witnessing the proliferation of a multitude of small churches characterised by a low degree of institutionalisation and a high symbolic and emotional density (Maffesoli, 2020). In this sense, digital sociality acquires a decisive value in transfiguring ordinary life, the realm of the profane, into a mythical and mystical experience, brushing up against the sacred in its wildest form (Bastide, 1975). Indeed, the relationships that emerge from these media landscapes reveal a capacity to associate what is separate in time and space, previously belonging to the spiritual and transcendent orders (Davis, 1999). Thus, the culture of connection and sharing actualises in secular spheres a whole set of symbolic experiences reminiscent of religious mysteries (Campbell, 2012). This imaginary modifies the modern relationship between technology and society according to a paradigm that could be called "technomagic".

Keywords

technique, magic, daily life, imaginary, rites

Teoria da Tecnomagia: Feitiços, Êxtase e Possessões na Cultura Digital

Resumo

Os rituais, as cerimónias e a efervescência do sagrado manifestam-se na cultura digital, não só através da proliferação de novos cultos religiosos. Fazem-no através da atualização online de formas religiosas tradicionais, mas também da elevação espiritual de objetos (Houtman & Meyer, 2012), práticas (Carolyn, 2014) ou imagens efémeras, lúdicas e oníricas (Susca, 2016). São, na maior parte dos casos, figuras que evocam os aspetos mais sensíveis e imateriais da experiência: a sua carne (Esposito, 2004; Henry, 2000) e o seu imaginário (Durand, 1992). Trata-se da atualização daquilo a que Durkheim (2008) chamou o "divino social". Assistimos assim à proliferação de uma miríade de pequenas igrejas que se caraterizam por um baixo grau de institucionalização e uma elevada densidade simbólica e emocional (Maffesoli, 2020). Neste sentido, a socialidade digital adquire um valor decisivo na transfiguração da vida quotidiana, do reino do profano, numa experiência mítica e mística, roçando o sagrado na sua forma mais selvagem (Bastide, 1975). De facto, as relações que emergem destes panoramas mediáticos revelam uma capacidade de associar o que está separado no tempo e no espaço, anteriormente pertencente às ordens espiritual e transcendente (Davis, 1999). Assim, a cultura da conexão e da partilha materializa em esferas seculares todo um conjunto de experiências simbólicas que lembram os mistérios religiosos (Campbell, 2012). Este imaginário modifica a relação moderna entre a tecnologia e a sociedade num paradigma que se poderia designar por "tecnomágico".

Palavras-chave

técnica, magia, vida quotidiana, imaginário, ritos

1. Introduction

> Cyberspace. A consensual hallucination experienced daily by billions of legitimate operators in every nation by children being taught mathematical concepts... A graphic representation of data abstracted from the banks of every computer in the human system. Unthinkable complexity. Lines of light ranged in the nonspace of the mind, clusters and constellations of data. Like city lights receding. (Gibson, 1988, p. 111)

> Today, engaged religion and atheistic science are waging one of their many contests... But I suspect the spectacle to watch is the ongoing and ancient shadow-play between magic and technology. (Davis, 2011, p. 11)

The communions with pagan overtones (Cowan, 2005) celebrated by the new rites of the online digital landscapes feed a form of belief based on the sharing of a secret (Simmel, 1998), an emotional order (Weber, 1971) and a communal lifestyle (Virno, 2002). Beyond the characteristics of the mobilising myths that somehow occupy a place within the flows of contemporary communication, the social body and the body itself are always celebrated through digital liturgies. It is the very data of profane life (Turner, 1974), beyond secularisation and disenchantment, that is sacralised: the flesh with its voluptuousness (Attimonelli & Susca, 2017), matter in its sensitive and sensitive character (Perniola, 1994). The media become the new totems of being together (Susca, 2011). Indeed, when the means of technical reproducibility extirpate the aura of the work of art (Benjamin, 2000), the public gradually becomes its object and subject. He reveals himself as the protagonist of a process of aestheticisation (Lipovetsky & Serroy, 2013) that forms a whole with its sacralisation.

The cult of the internet (Breton, 2000) and its ideology (Musso, 2003) refers to new forms of fetishism, utopia and non-rational adhesion. They show to what extent the devices in question do not simply constitute technologies at the service of a pragmatic or functional political-economic project. They rather constitute a symbolic territory capable of channelling and expressing the realm of the "unproductive life" (Bataille, 2003; Joron, 2010), namely desires, sensibilities and impulses irreducible to the guiding idea of progress and traditional grand narratives.

From this perspective, we propose to verify, through the prism of the sociology of the imaginary, to what extent and in what forms the public opinion that founded Western and modern culture (Habermas, 1962/1995) gives way to a "public emotion", where reason no longer directs the senses, but where the senses are invited to think (Susca, 2016). It is possible to observe a shift from a paradigm based on the individual and abstraction to one based on the "we" and empathy (McLuhan, 1964/2004), in which the spatiotemporal model of ubiquity, proxemics and synchronicity becomes paramount. The fundamental difference with the above is that the new forms of collective adhesions and beliefs are not projected elsewhere — the perfect society, salvation, Heaven or Earth. Instead, they are sacralised to the extent that they allow individuals to connect, merge and vibrate in unison. They can immerse themselves in the world in the most intense and embodied way possible, even if these experiences are often linked to the order of consumption (Obadia, 2013) and ephemerality (Pace, 2018).

In such a context, faith is no longer oriented towards the future and is not based on abstract concepts and figures. Instead, it becomes an experience rooted in the here and now (Haynes, 2012), in everyday life (Castells, 1998), dedicated on the one hand to the material and sensitive dimensions and on the other to an immaterial universe close to fantasy, dream and even science fiction. It is appropriate to describe and note the paradigm shift between "technology" as it was conceived from the Renaissance to the mid-20th century (Simondon, 2014) and contemporary "technomagic". We will highlight the emblematic figures of this shift to understand this transition.

2. The Dawn of Man

At its peak, the technique still has the magical resonance of a disquieting wonder with stunning and frightening features. Its cutting-edge performances are constantly accompanied by a smell of obsolescence for the human being, a whiff of excess, already leaving the wound of a tear. Thus, the individual overflows into a corporeality situated outside its organic framework, tasting both the limits of its own condition and its possible excesses to the point of caressing, even defying the faculties inherent in the divine. In the archetypes and stereotypes in which it is actualised, mythology bears witness to this with a sustained cadence, while the social body constantly metabolises its imprints in the wefts of everyday life. The mystical, the aesthetic and the sensual permeate all techniques (Simondon, 2014) and relativise their logical and functional dimensions.

Stanley Kubrick perfectly crystallised the spirit and genealogy of technology with the remarkable scene in *2001. A Space Odyssey* (1968), where those who are supposed to be our ancestors were dazzled by the appearance of a monolith. Appalled and bewitched by its majesty, following a phase of panic and confusion, they ended up dancing around this new totem. Today, we could suggest, in other words, that they were communing, putting themselves in common, and generating a community from a technical artifice of high symbolic density. According to the great director, in agreement with many anthropologists, sociologists and philosophers of technology, this is the *dawn of man*. It is a controversial origin because while linking the individual to the other, every technique also serves to separate.

In this interplay of forces, we find our long history of contradictions, splendours and miseries, conquests and abuses (Abruzzese & Borrelli, 2000). Its traces reveal to us that technical innovation, when deployed in the social scene, is first welcomed as a device with a magical allure because of its ability to enchant the world, to unite what is divided and to attribute unheard-of powers to human beings by making them touch both the divine and the cosmic order (Mauss, 2004); before and after this interval, the time is for study, calculation and even rationalisation.

Applying such a schema to any era, by going through history, it is possible to trace a cyclical alternation of the spirit dominating the system of objects and identify a change between eras in which sometimes a utilitarian principle prevails — that is, the capacity to intensify man's action on the world, the domination of nature and instrumental action. Sometimes, on the contrary, the trinity of aesthetic, religious and magical values prevails: beauty rather than utility, communion rather than contract, and ecstatic vibration instead of interest. In the first case, the social mobilisation around the discovery of the moment tends towards the achievement of a goal — progress, wealth, conquest, among others — whereas, in the second, it constitutes an end in itself: technology is merely the link, the crucible where the social takes shape and "happens". Here, we see a diffuse communion, a mystical participation, not only within a specific group but also between it, the Earth and the cosmos. In order to grasp this amalgam and to understand in depth the weave of correspondences that is always woven between body and technique, nature and culture, dream and material reality, it is appropriate to immerse ourselves in a genealogical perspective.

3. From Totemism to the Web

At first, technology, magic and religion were inextricably linked, so much so that the highest degree of mystical experience naturally corresponded to the subtlest level of technological action and occult art (Graf, 1994). Totemism, a practice of tribal religion that allowed a group to unite in ecstatic friction with the divine and the nature around them (Durkheim, 2008), was the emblematic figure of the synergy between these three factors. The process of civilisation (Elias, 1973) subsequently caused the radical tearing apart of such a paradigm. From the Renaissance onwards, in particular, following the invention of perspective and what architects called the "point of distance" (Alberti, 2015), the subject experienced a gradual symbolic and physical separation from all its otherness (Dumont, 1983).

As an object of study, as materials to be shaped, as a landscape to be mastered and constructed, everything that moves away from the individual bubble becomes foreign, almost suspicious of what it hides and cannot be reduced to the order of reason. Modernity and the technology that characterise the press (McLuhan, 1966), in particular, have generated a process of splitting up words and things (Foucault, 1966), body and mind, subject and object, acting in the direction of a progressive rationalisation of existence, leading to the disenchantment of the world (Weber, 1964). Thus, we have lost the *anima mundi* evoked by Giordano Bruno (2000) to name the invisible but solid links, "vinculis", between individuals and nature, Heaven and Earth, organic and inorganic.

Religious effervescence was thus extirpated from the body of the tribe and institutionalised by the transcendence of sacred texts: the Bible was the first printed book, and with it, the long process of abstraction from the world and individualisation was inaugurated; magic was relegated to the underworld and stigmatised as a religion of the masses or a fog of consciousness; technology was presented as a means of human domination over nature, an instrument capable of solving problems and an effective tool for accentuating disjunction with the "other", or for establishing a relationship with him based on a contract, interest or project. This is how nation-States and their impassable borders came into being and how the sciences spread with their prescriptive knowledge and methods inaccessible to most individuals. This is how the elitist caste of guardians of the political, religious, technical, and artistic world came to be imposed.

The splendour of this era carried with it, like the final bouquet of a firework display, its decline, the announcement of its catastrophe. As Marshall McLuhan noted in the 1960s, the social diffusion of the new electronic media is the agent of the deflagration of modern culture and its political, social, identity and economic order (McLuhan, 1977). Although such an invention originated in techno-scientific laboratories developed in the 18th and 19th centuries, its use and consumption — in other words, the social appropriation of which it is the object — have been directed against the intentions of its creators, like the monster created by Dr. Frankenstein to fulfil his dreams of glory.

The social manipulation of technological innovation is the main spark that causes this chain of perverse effects (Boudon, 1977), at the heart of what Guy Debord (1992) called "the society of the spectacle". To grasp its full meaning, we need only look at the parable of the internet (Flichy, 2001). Indeed, invented for military and academic purposes, it has been transformed by an insertion into the pool where many forms of collaboration, connection and sensitive intelligence with a strong anti-modern connotation are experimented. These are non-vertical, non-rational, non-ideological, separate from the elites, impertinent towards established law and disjunctive towards the order of nations. The web, in particular, with its contemporary incarnations in the form of social networks, video-game worlds, dating sites and emotional, symbolic or sexual exchanges, has become the portal for imaginaries and practices whose non-logical, dreamlike and festive aspect takes precedence over everything else (Susca, 2016). This forces the sector elites to hide more and more the political and economic aspect that presides over its action. We constantly see how difficult it is for the instituted power to maintain such a cursed part of the productive order (Bown, 2015).

It is clear that there is a conflict between techno-science, political economy and politics on the one hand and the users of the web on the other, for whom what counts in cyberspace is, above all, the mystery of the conjunction, the dance of masks, the price of priceless things and the power of the imaginary. Here, the public sphere crumbles into a multitude of networked affective and cognitive gatherings, each with its own ethical order impinging on universal morality, its sentiments and paradigms. This is why illegal downloading has never been so popular (Muso, 2018): most cybernauts violate copyright law spontaneously (Gulmanelli, 2003), without scruples, by evading their own duties as citizens to prefer hedonism and the pleasure of uniting with the group through the sharing of information, symbols, sounds and affects. This same vocation encourages everyone to surreptitiously reduce their working hours in order to take advantage of their screens to chat on Telegram, post photos on Instagram, flirt on Tinder or Grindr, follow gamers on Twitch or wander through the trends of TikTok.

The abuses in question are not just about entertainment but also involve a great sacrifice: the gift of the subject. When intimate photos are published in stories, when people go through the rituals of sending nudes or even, in a more mundane way, when we do not enjoy a hot meal, a kiss at sunset or a live singer's performance to take pictures and post them online, that experience is less and less an individual phenomenology than a collective and connective one. I do not experience it if the other person is not there to make it a common story. It does not matter that Google, Facebook or Microsoft are devouring our existences transformed into data and commodities (Sadin, 2015) by betraying the societal impulses that animate digital sociality. What matters for the users in question is the paradoxical pleasure of being connected to others, even depending on the lives of others.

Undeniably, the dialectic between submission and freedom is short-circuited insofar as we are faced with a voluntary, perhaps unconscious alienation compared to the industrial age. This is undoubtedly aimed at establishing and corroborating a series of pacts and solidarities between peers: the friends of games, parties, tricks, vibes, and fetishes, among others. Although it may seem contradictory, while they easily cede sensitive information to the GAFAM (Google, Apple, Facebook, Amazon, and Microsoft), internet users organise themselves into electronic communities in and for themselves in the name of a shared taste, a moving icon or an ephemeral thrill. They discover the power of the interstices or how to be free without freedom. They do this by hijacking the codes instituted by memes, GIFs or trolls but also by elaborating fake worlds that are more real than reality because of their capacity to induce a common vibration.

Technology is transfigured into a tool that can refine and socialise the ingrained tactics of popular cunning (De Certeau, 1999). In other words, the set of practices constantly used by the social body to defend itself from the aggressive and pedantic gaze of power (Maffesoli, 1988). The shift we are witnessing has the characteristics of a true anthropological mutation, where what was previously expressed in terms of "resistance" is now translated into "recreation" and "re-creation" (Susca & Bardainne, 2008). As the new media favour the manipulation of language and symbolic order from their basic grammar (Lévy, 1994), a tendency to reverse the role between producer and consumer of content (Jenkins, 2006), as well as the connection of sensibilities that were previously too small and dispersed to manifest themselves operationally and perceptibly (Castells, 1998). In that way, the map of power and the face of technology are altered.

4. Public Emotion

Technique ceases to be the art of *logos*, the instrument of what Heidegger (1958) calls "calculating thought", "technology" to become "technomagic" (*Les Cahiers Européens de l'Imaginaire*, issue "Technomagie"), a totem around which everyone, with their networks, masks and fantasies, experiences a kind of mystical ecstasy that is both pure dance — a celebration of the here and now — and a flight towards something greater than oneself. The bond born of this condition is no longer based on a rational and abstract contract, the "social contract", but on a pact in which emotion, passions and shared symbols become the new axes of being together (Maffesoli, 2007), the presuppositions of all fusion and connective effusion. Here is the emergence of a cultural sensibility in which the balance between reason and meaning is reversed in favour of the latter, relativising the paradigm of rational and abstract thought that has fuelled the dynamics of Western modernity.

The experience elaborated in the alveolus of digital culture reveals an unprecedented synergy between the mind and the senses, the visible and the invisible, rational action and magical thinking. The worship of the various fetishes that underpin the contemporary cultural scenario entails, for each person involved, a high degree of ecstasy and bewitchment. It also results in a consciousness with a connected memory and embodied highly refined knowledge. The augmented intelligence articulated by these architectures of bytes and neurons draws its strength from a general intellect (Marx, 1968), the common thought (Virno, 2002), in which the brain of each individual is a node, an information point of passage preceded and exceeded by a matrix of a holistic character — which includes immense databases, powerful algorithms and artificial intelligence — that is larger than the subject. The individual brain is externalised (De Kerckhove & Miranda, 2014) so that it tends to forget and even forget itself insofar as it is invested in the moment, weaving, navigating, and reacting to injunctions that allow it to stay connected to its contacts beyond space and time. In a way, the rise of the system is the corollary of the loss of the rational, autonomous and separate individual conceived by humanism (Attimonelli & Susca, 2021).

Instagram and TikTok subscribers contemplate stories or reels for hours. They indulge in their bewitching narrative while having a powerful mass of information at their disposal that allows them to decipher and contextualise the nuances of the stories they observe. Twitch fans contemplate their heroes in a form of interpassivity that, like digital hypnosis, induces a kind of suspension of consciousness (Zizek, 2004). Thus, they neither need nor want to play, as the game consists precisely of seeing others play. It is a metagame whose real asset is its ability to actualise sociality, as *GTA* or *League of Legends* will become pretexts for getting in touch with others based on the intersection between everyday life in its most anodyne aspect and fantasy in its paroxysmal state. These practices were radicalised during the COVID-19 pandemic to the point of becoming the place for social interactions par excellence (Joron, 2020). The infatuation, addiction and frenzy that characterise them do not only concern fans or simple users but also streamers and any other content producer who ends up transmitting and exposing his or her life as an audiovisual narrative (Codeluppi, 2015) as part of an infinite performance capable of exhausting and emptying the subject — of returning it to the other (Ferraris, 2016), available as work, data and object of consumption.

Each of these fetishes, sites and networks, emblems of a highly emotional sociality, exhorts to a technomagical participation animated by an effervescence whose mystical aspect, with non-rational contours, is significant. However, despite these incantatory flows, individuals recognise with a certain lucidity and competence the mythology by which they allow themselves to be dazzled. In a way, they dream by knowing how to dream. Moreover, it is easy to see that the scenes expressing the culture in gestation between the web and the street know in detail the techno music that induces them into a trance state (Attimonelli, 2018). They distinguish with acuity the finishing touches of the gadgets that distinguish its style, carefully select the reels or stories in front of which to abandon themselves for hours.

We are witnessing the shift from public opinion, with its rational and abstract connotations, to public emotion, where intelligence becomes sensitive (Maffesoli, 2005) and integrates into the mental framework the imaginary, sacred and affective charge neglected or even banned by a large part of modern culture. For some years now, on social networks, for example, we "react" with hearts, emoticons, GIFs, vibes and memes before thinking. This is why we are led to choose and think with our senses, even before we do so with abstract reasoning, unconsciously, just as it happens when we fall in love or engage in a business, guided by a favourable impression, an ineffable intuition.

5. Imaginary, Myths and Rites

Marshall McLuhan (1964/2004) was the first to anticipate the magical and tribal resonances of our societies by suggesting, with powerful metaphors, that in our electronic age, we would take on the whole of humanity as our skin. Our body would thus be the territory, the unconscious protagonist of a double process, which, although seemingly invisible — and precisely because we cannot distinguish it with precision — has a tremendous effect on the webs of our culture. These range from the field of knowledge to interpersonal relations and to relationships of pleasure.

Without knowing it, we are becoming cyborgs, or better still, as Andy Clark (2004) argues, we are naturally born as cyborgs. On the one hand, we are extending our central nervous system beyond the boundaries of our brain — into external memories, "clouds", digital network albums, and the like — and on the other, we are reabsorbing them into our flesh through wearable devices, microtechnologies and wearable computers. This happens both naturally and unconsciously: we know how to retrieve the details of our existence in a personal digital assistant, can laugh with Alexa, and manage to translate, narrate and aggrandise our lives in stories through hashtags, GIFs and stickers, but are unaware of the technical process that makes this possible.

Technology and magic are distinguished, in particular, by the presence in the former of a congruent relationship between cause and effect, the effort produced, and the result obtained. In the age of technomagic, the mechanical or functional principle that serves as the fulcrum of modern technological action is, on the contrary, disarticulated. Long before the mass diffusion of computers, Theodore Roszak (1994) had already grasped the symbolic power of electronic media:

> the vision is this: one sits before a brightly lit screen, stroking keys, watching remarkable things flash by on the screen at the speed of light. Words, pictures, and images appear out of nowhere. Like a child, one begins to believe in magic all over again. And because one is making the magic happen, an intoxicating sense of power comes with the act. One has the culture of the entire planet there at one's fingertips! All the databases, libraries, archives, movies, art museums, bulletin boards, telephones and fax machines in the world are in this one box. (p. 186)

Meanwhile, the box has become almost invisible. Moreover, the results of our actions towards the digital devices that surround us have little to do with the behaviour that unleashes them and seem rather to be the product — or at least our perception of it — of a mystery, as if our era was governed by magical principles stemming from the period before the "enlightenment":

> the commands you type into a computer are a kind of speech that doesn't so much communicate as make things happen directly and ineluctably, in the same way pulling a trigger does. In other words, they are incantations, and anyone at all attuned to the technosocial megatrends of the moment (...) knows that the logic of the incantation is rapidly permeating the fabric of our lives. (Dibbel, 1993, para. 53)

According to a model that transforms the tools we use into "technologies of adjuration" (Bohrer, 2011), when we have troubles with our devices, as a result of the imploring of fate, impulsive and even violent reactions reminiscent of arguments with partners of couples, closest friends or family members, we appeal to the new magicians of our time: nerds, who seem to be the repositories of an occult knowledge capable of initiating us into the new world, one where to paraphrase Shakespeare (1998), we are of the stuff our dreams are made of. As masters of a universe unintelligible to most individuals, hidden in the shadows of their rooms and garages, capable of deciphering the "metaphysics of code" (Josset, 2011), these specialists with a hacker ethic are associated in the imagination with the figures of the "shaman" (Davis, 1999) or the "barbarian" (*Les Cahiers Européens de l'Imaginaire*, issue "La Barbarie").

Like the latter, they carry a sensibility alien to that established in modern institutions of knowledge and power. As Wark Mckenzie (2004) and Pekka Himanen (2001) suggested in their pioneering books on the subject, the hacker imaginary implies overcoming individualism, the principle of private ownership of knowledge and information that have long characterised our societies. As an art of doing, this spirit re-evaluates the practice of giving through a sociality in which the border between play, passion and work is blurred. The result is a series of solidarities capable of forming a body — better still, "flesh", electronic flesh — and establishing forms of knowing and being together based on initiation and secrecy, with their corollaries of rites and myths that re-enchant an economic scientific and political world governed by instrumental reason, production and other quantitative criteria.

6. Mediatisation of Existence

Today, more than ever, the immaterial permeates reality and shapes it in its own image, becoming a real material force. How can we believe, moreover, that the more or less young generations who spend a large part of their day on Twitch or TikTok can circumscribe and limit to the digital dimension the experience lived on these platforms in terms of play, sociality and passion? The way of inhabiting the world, confronting the other, knowing and acting, cannot be based on a schizoid separation where physical citizenship is on one side and electronic life is on the other. If there is one thing we can be sure of — the theatricalisation of everyday life is there to show it — it is that our investment in media landscapes is the cause and effect of a new way of thinking and living being there, being with — a new embodiment. We are on the verge of verifying the effects of the deployment of a "third dimension" on the world: a syncretism between our presence in material existence and our immaterial presence in various electronic lives.

Reels in the street, #challenges at the seaside, hearts with hands, *LOL* (laughing out loud) of all kinds, stories and selfies everywhere: an important and growing series of behaviours taking place in physical reality are now simply the posts of activities born on social networks. The uses of digital photography, for example, express the extent to which the camera and its updates no longer play the role of witnesses to reality, serving to immortalise the traces of the past, but become devices for the elaboration and societal reconstruction of reality: they constitute a layer of the present or the very moment in its revelation to the world. It is a surreality that integrates, in the consciousness of every individual, the look and touch of the other. For this reason, today, there is no situation, however trivial — or even especially trivial — that is not photographed. Whether it is a romantic kiss in a tourist spot, a concert at the Rockstore, a window display at Supreme, a sunset at the Pincio or the Poke Bowl, we are about to eat, and we are all consumed by the need and desire to capture the images of our experience. Only after we have seen it on the screen and shared it with our networks, when we get feedback such as likes or shares, we feel we have lived it. In short, that it exists. If not, it did not happen.

"Everything that was directly experienced has moved away into a representation", wrote Guy Debord (1992, p. 15). A decade or so after his words, following the message of the culture industry (McLuhan & Fiore, 2003) and the long training in the mediatisation of existence on the part of the social body, the situation has changed: what was once a representation becomes the world and the image is translated into experience. In contrast to the phantasmagorias that marked the advent of the film and television age, we are now in the presence of worlds where ghosts can be touched. In this context, both the tactile aspect of existence and the imagination are brought into play at the same time. This is why we are so frustrated by the months of confinement following the COVID-19 pandemic, where our lives were circumscribed to the electronic dimension alone via screens (Joron, 2020). The history of mass communication has accustomed us, on the contrary, to reversibility between media and daily life, one being regenerated by the other and vice versa (Flichy, 1992).

At the cinema, the audience, as if hallucinated, projects itself onto the screen and allows itself to be transported, according to Edgard Morin's (1957) interpretation in his book *Le Cinéma ou l'Homme Imaginaire* (Cinema or the Imaginary Man), into the bodies of the stars. Subsequently, the emotion experienced after being dazzled by Greta Garbo or Rodolfo Valentino leaves the cinema with the spectator and contaminates social life, helping to disseminate it with dreamlike and sensual imaginings. In the heart of cyberspace, we extend ourselves, on the contrary, towards masks (avatars, nicknames, virtual identities, *memoji*) that we have generated ourselves. We are thus possessed and even overwhelmed by forms that we have elaborated. According to Derrick de Kerckhove (1995), we become creatures of the artifices we have created. In other words, William Gibson (1988), in his famous novel *Neuromancer*, describes life in electronic territories as a "consensual hallucination" (p. 67).

In this wake, video games such as *Minecraft*, *Scrap Mechanic*, *Raft* and many others increasingly provide for the coincidence of the player's figure and that of the architect, following a pattern inaugurated by the virtual universe *Second Life* in the early 2000s. The emoticons used to express emotions beyond words in mediascapes are elaborated and personalised directly by users, as in *memojis*; storytelling is no longer an overarching narrative but is transfigured, via reels or social network stories, into a fanciful and spectacular self-narrative that aestheticises every individual at the very moment when he or she abandons himself or herself to the other.

Henry Jenkins (2006) has pointed out in his book *Convergence Culture* that many fans have begun to use the Harry Potter story as a starting point for developing several magical universes in which they are simultaneously the protagonists and the new wizards. There are several ways in which the process of magification in contemporary culture is actualised, among many others. This is taking place alongside various phenomena, such as the increasing use of unconventional medicine, astrology, and new-age spiritual techniques, as well as the growing popularity of films, role-playing games, series and video games such as *Game of Thrones* (2011–2019), *Avatar* (2009), *The Legend of Zelda* (1986), *Dungeons & Dragons* (1974), and *Fantastic Beasts* (2016). On reflection, the success of these narratives is directly proportional to the crisis of universal truths and grand narratives.

An outbreak of neo-mysticism is setting the social landscape ablaze, nuancing and even contradicting the knowledge society's most rational and progressive premises. Thus, Erik Davis (1999) suggests, revisiting the most fashionable theories on the relationship between culture and technology, that "today there is so much pressure on information that it cracks and overflows with energy, attracting mythologies, metaphysics and fragments of arcane magic" (p. 28). We are not all cyborgs, but everyone is unconsciously transformed into a little magician of a re-enchanted world where we become jointly subjects and objects of new possessions, idolatries and new sacrifices.

The altars of consumption and communication, high places of social divinity in its electronic flesh, between data, art and merchandise (Obadia, 2013), tend to superimpose themselves, in terms of symbolic power, on the religious cathedrals and classic political institutions. They desacralise what was sacred by sacralising profane imaginaries to the point of shrouding everyday life with magic, including, or especially, its shadows. We could even say that contemporary culture contributes, for better or for worse — from the skull and crossbones to darkness, via defilement, mourning and the whole "aesthetics of unease" (Attimonelli, 2020) — to integrating the cursed part evoked by Bataille (2003), which had been marginalised, if not repressed, by modern socio-cultural systems for several centuries in their attempt for rationality (Weber, 1964).

What emerges unexpectedly is the nature of the sacred and the sacrifices at stake: the masks deployed in contemporary theatres without walls, scattered between the web and the street, dance around new totems in the name of their pleasure, even if it is ephemeral. They do so according to their own lifestyle, without adhering to transcendences or projects that are at odds with the imaginary of the group to which they belong. The initiation rites for accessing these universes are neither written nor prescribed but are rather part of the community's embodied knowledge. Their codes have some occult quality; they appear elusive and opaque to those outside the tribe. It is no coincidence that the prevailing discourse concerning these circles is tinged with criticism and contempt.

Let us not forget, for example, that in one of his last lectures before he died in 2016, even Umberto Eco (*Lectio Magistralis*, University of Torino, June 10, 2015), one of the most lucid interpreters of mass culture, had argued that social media are the place where every fool has the right to speak. Without a doubt, these platforms express an intelligence completely different from the one promoted by the Goddess of Reason of Enlightenment and put in place by modern power and knowledge since the 18th century. It is a "sensitive reason" (Maffesoli, 2005), a connective intelligence (De Kerckhove, 1997), or a way of being there and understanding the world for which the playful and dreamlike dimensions of existence, emotions and the "us" are primordial. According to such a paradigm, technology no longer manifests itself as a pure panoply of instruments to solve problems, accomplish tasks and act on the environment. It takes the form of a technomagic, capable of fostering the communion of communities around communications, icons and other fetishes.

7. Digital Liturgies

Three centuries after the birth of modern metropolises, the mediatisation of our existence is finally taking place, a condition by which the media become our main language. After a long period in which technology welcomed the human impulse by playing the role of an instrument at its disposal, we now find ourselves in an integral and intelligent system of information, algorithms and devices. They are so powerful that we are now the ones who derive from it. The author of the famous phrase "the medium is the message", Marshall Herbert McLuhan, was nevertheless aware of this drift: "by relentlessly submitting to technologies, we become servomechanisms of them. That is why, if we want to use these objects, these extensions of ourselves, we must serve them as gods, respect them as a kind of religion" (McLuhan, 1964/2004, p. 40). The Promethean myth is exhausted; it is the threadless chains that preside over our lives and our bonds. They are ropes, laces, strings, or better still the "ligatures" described by Giordano Bruno

(2000) in his writings on magic. We are caught in their nets that connect us to the world beyond good or evil.

> For the first time in the history of the world, we have the absolute in our pocket. The device, of which the web is the most obvious manifestation, is an empire on which the sun never sets, and having a smartphone in one's pocket certainly means having the world in one's hand but automatically also being in the hands of the world: at any moment a request may arrive, and at any moment we will be in charge. (Ferraris, 2016, p. 17)

Contemporary technomagic, in its archaic magnetism and futuristic imaginings, is the totem of digital and post-urban sociality, its basic symbolic reference. A source of ambiguous effervescence, in its convulsive webs, individuals are simultaneously in ecstasy, out of themselves, and in the abyss, in the process of precipitating between the euphoria of eroticism, in the arms of the other and the anguish of alienation, under the gaze of the other, so that they lose sight of whether they are the subjects or the objects of the dynamics in question.

Navigating these waters triggers an initiatory wandering that unveils the imaginary boundaries of the world to come (Hugon, 2010). It also goes beyond psycho-geography, politics and cultural forms stemming from humanism, Western modernity and their pivot: the rational, autonomous and separate individual. The completion of the system of signs, simulacra and objects, this matrix with its blurred contours where the biosphere is integrated, and even exceeded, by the noosphere, is indeed the high place upon which we are subjected. We end up being possessed by that over which we once had the mastery. Such a malaise of the individual can be easily detected, for example, in the psychopathology of information overload (Lovink, 2011) as a social disease that spreads from the mediascapes and affects us as soon as the quantity, quality and speed of the data we receive are humanly unmanageable, a source of disorder and chaos (Fisher, 2009). Again, we are victims of the contradictory happiness of being plugged in, connected, informed, active and available, always on while conferring digital citizenship, and this condition saturates us.

As was the case with medieval carnivalesque excesses, contemporary performances, online but also in the flesh, with old and new substances — psychotropic potions, alcohols, drugs, social network notifications, binge-watching television series, endless playlists and anaesthetic drugs combined — are punctuated by ingesting, consuming and surrendering to the other. The resulting weakening of the subject is both an opening and a tearing, in the form of a violation of privacy, *pornoculture* (Attimonelli & Susca, 2017), crisis of intimacy, reflective impotence (Fisher, 2009) or informational stress (Berardi, 2006), is probably the origin of the ambient obscenity, a real "total collusion of elements" (Baudrillard, 2000, p. 33).

In the digital liturgies celebrated between posts, live streams, selfies, stories or reels, everything seems to be driven by both the thirst for pleasure — to lust, to get excited, to dream, to enjoy — and the flirtation with death. Thus, the tragic side of existence once again imposes itself on the scene. If we look closely, the joy that presides over the multiple orgasms, the effervescence and the trances of our time is tragic: it envelops the subject in itself when it bursts when it fails. This is a step backwards compared to the march of progress undertaken by Western culture since the 18th century. A step backwards, but a dance step. As in the ecstatic rites of the past to exorcise death through a common ritual thrill (Pecere, 2021), it establishes a conjunction between the individual and everything beyond him, handing him over to the force of fate. Under the influence of technomagic, the first dark lights of the digital dawn appear.

References

Abruzzese, A., & Borrelli, D. (2000). *Tracce e immagini di un privilegio*. Carocci Editore.

Alberti, L. (2015). *De pictura*. Alias.

Attimonelli, C. (2018). *Techno: Ritmi afrofuturisti*. Meltemi.

Attimonelli, C. (2020). *Estetica del malessere. Il nero, il punk, il teschio nei paesaggi mediatici contemporanei*. DeriveApprodi.

Attimonelli, C., & Susca, V. (2017). *Pornoculture. Voyage au bout de la chair*. Éditions Liber.

Attimonelli, C. & Susca, V. (2021). Black Mirror *et l'aurore numérique*. Éditions Liber.

Bastide, R. (1975). *Le sacré sauvage et autres essais*. Stock.

Bataille, G. (2003). *La part maudite. Précédé par la notion de dépense*. Les Éditions de Minuit.

Baudrillard, J. (2000). *Mots de passe*. Fayard.

Benjamin, W. (2000). *Angelus novus: Saggi e frammenti*. Einaudi.

Berardi, F. (2006). *Precarious rhapsody: Semiocapitalism and the pathologies of post-alpha generation*. Autonomedia.

Bohrer, C. (2011). Technologies de l'adjuration. *Les Cahiers Européens de l'Imaginaire*, (3), 112–124.

Boudon, R. (1977). *Effets pervers et ordre social*. PUF.

Bown, A. (2015). *Enjoying it:* Candy Crush *and capitalism*. Zero Books.

Breton, P. (2000). *Le culte de l'internet. Une menace pour le lien social?* Éditions La Découverte.

Bruno, G. (2000). *La magia e le ligature*. Mimesis.

Campbell, H. (2012). *Digital religion*. Routledge.

Carolyn, H. (2014). *The multimediates rhetoric of the internet: Digital fusion*. Routledge.

Castells, M. (1998). *L'ère de l'information. Volume 1: La société en réseaux*. Fayard.

Clark, A. (2004). *Natural born cyborg*. Oxford University Press.

Codeluppi, V. (2015). *Mi metto in vetrina. Selfie, Facebook, Apple, Hello Kitty, Renzi e altre "vetrinizzazioni"*. Mimesis.

Cowan, D. (2005). *Cyberhenge. Modern pagans on the internet*. Routledge.

Davis, E. (1999). *TechGnosis: Myth, magic and mysticism in the age of information*. Crown Publishers.

Davis, E. (2011). Rêve instrumental. *Les Cahiers Européens de l'Imaginaire*, (3), 150–162.

De Certeau, M. (1999). *L'invention du quotidien*. Arts de faire. Gallimard.

De Kerckhove, D. (1995). *The skin of culture*. Somerville.

De Kerckhove, D. (1997). *Connected intelligence*. Somerville.

De Kerckhove, D., & Miranda, C. (Eds.). (2014). *The point of being*. Cambridge Scholars Publishing.

Debord, G. (1992). *La société du spectacle*. Gallimard.

Dibbel, J. (1993). *A rape in cyberspace*. Julian Dibbel. http://www.juliandibbell.com/articles/a-rape-in-cyberspace/

Dumont, L. (1983). *Essais sur l'individualisme. Une perspective anthropologique sur l'idéologie moderne*. Seuil.

Durand, G. (1992). *Les structures anthropologiques de l'imaginaire*. Dunod.

Durkheim, É. (2008). *Les formes élémentaires de la vie religieuse*. CNRS Éditions.

Elias, N. (1973). *Sur le processus de civilization. Volume 1: La Civilisation des mœurs*. Presses Pocket.

Esposito, R. (2004). *Bìos. Biopolitica e filosofia*. Einaudi.

Ferraris, M. (2016). *Mobilisation totale*. PUF.

Fisher, M. (2009). *Capitalist realism: Is there no alternative?* Zero Books.

Flichy, P. (1992). *Une histoire de la communication moderne*. Éditions La Découverte.

Flichy, P. (2001). *L'imaginaire d'Internet*. Éditions La Découverte.

Foucault, M. (1966). *Les mots et les choses*. Gallimard.

Gibson, W. (1988). *Neuromancien*. Éditions J'ai lu.

Graf, F. (1994). *La magie dans l'antiquité gréco-romaine*. Les Belles Lettres.

Gulmanelli, S. (2003). *PopWar. Il Netattivismo contro l'ordine costituito*. Apogeo.

Habermas, J. (1995). *Storia e critica dell'opinione pubblica* (A. Illuminati & F. Masini, Trans.). Laterza. (Original work published 1962)

Haynes, P. (2012). *Immanent transcendence: Reconfiguring materialism in continental philosophy*. Continuum.

Heidegger, M. (1958). *Essais et conferences* (A. Preaux, Trans.). Gallimard.

Henry, M. (2000). *Incarnation. Une philosophie de la chair*. Seuil.

Himanen, P. (2001). *L'éthique hacker et l'esprit de l'ère de l'information*. Exils.

Houtman, D., & Meyer, B. (2012). *Things: Religion and the question of materiality*. Fordham University Press.

Hugon, S. (2010). *Circumnavigations. L'imaginaire du voyage dans l'expérience Internet*. CNRS Éditions.

Jenkins, H. (2006). *Convergence culture. Where old and new media collide*. New York University Press.

Joron, P. (2010). *La vie improductive. Georges Bataille et l'hétérologie sociologique*. PULM.

Joron, P. (2020). Sós todos juntos: Pele digital e fissuras digitais. In C. F. Gutfreind, J. Machado da Silva, & P. Joron (Eds.), *Laço social e tecnologia em tempos extremos: Imaginário, redes e pandemia* (pp. 25–43). Sulina Editora.

Josset, R. (2011). Du psychédélisme au réseau cybernétique planétaire: L'accomplissement de la métaphysique. *Les Cahiers Européens de l'Imaginaire*, (3), 248–259.

Lévy, P. (1994). *L'intelligence collective. Pour une anthropologie du cyberspace*. La Découverte.

Lipovetsky, G, & Serroy, J. (2013). *L'esthétisation du monde: Vivre à l'âge du capitalisme artiste*. Folio.

Lovink, G. (2011). Psychopathologie de la surcharge d'informations. *Les Cahiers Européens de l'Imaginaire*, (3), 136–141.

Maffesoli, M. (1988). *Le temps des tribus. Le déclin de l'individualisme dans les sociétés de masse*. Méridiens-Klincksieck.

Maffesoli, M. (2005). *Éloge de la raison sensible*. La Table Ronde.

Maffesoli, M. (2007). *Le réenchantement du monde*. La Table Ronde.

Maffesoli, M. (2020). *La nostalgie du sacré*. Cerf.

Marx, K. (1968). *Oeuvres* (Vol. II). La Pléiade.

Mauss, M. (2004). *Sociologie et anthropologie*. PUF.

Mckenzie, W. (2004). *A hacker manifesto*. Harvard University Press.

McLuhan, M. (1966). *The Gutenberg Galaxy. The making of typographic man*. University of Toronto Press.

McLuhan, M. (1977). *D'œil à Oreille* (D. De Kerckhove, Trans.). Hurtubise HMH.

McLuhan, M. (2004). *Pour comprendre les medias* (J. Paré, Trans.). Seuil. (Original work published in 1964)

McLuhan, M., & Fiore, Q. (2003). *The medium is the MASSAGE*. Penguin Books.

Morin, E. (1957). *Le cinéma ou l'homme imaginaire*. Les Éditions de Minuit.

Muso. (2018). *Annual piracy report*. https://www.muso.com/magazine/publishing-under-threat

Musso, P. (2003). *Critique des réseaux*. PUF.

Obadia, L. (2013). *La marchandisation de Dieu. L'économie religieuse*. CNRS Éditions.

Pace, E. (2018). Les cyber-religions entre dématérialisation du sacré et réenchantement du monde. *Sociétés, La Dématérialisation du Sacré,* (139), 61–72. https://doi.org/10.3917/soc.139.0061

Pecere, P. (2021). *Il dio che danza. Viaggi, trance, trasformazioni*. Nottetempo.

Perniola, M. (1994). *Le sex-appeal de l'inorganique*. Léo Scheer.

Roszak, T. (1994). *The cult of information. A neo-luddite treatise on high tech, artificial intelligence, and the true art of thinking*. University of California Press.

Sadin, E. (2015). *La vie algorithmique: Critique de la raison numérique*. Éditions l'Échappée.

Shakespeare, W. (1998). *The tempest*. Paradigm Publishing.

Simmel, G. (1998). *La réligion*. Circé.

Simondon, G. (2014). *Sur la technique*. Presses Universitaires de France.

Susca, V. (2011). *Joie tragique. Les formes élémentaires de la vie électronique*. CNRS Éditions.

Susca, V. (2016). *Les affinités connectives. Sociologie de la culture numérique*. Cerf.

Susca, V., & Bardainne, C. (2008). *Récréations. Galaxies de l'imaginaire postmoderne*. CNRS Éditions.

Turner, V. (1974). *The ritual process*. Penguin Books.

Virno, P. (2002). *Grammatica della moltitudine. Per un'analisi delle forme di vita contemporanee*. Derive Approdi.

Weber, M. (1964). *L'éthique protestante et l'esprit du capitalisme*. Plon.

Weber, M. (1971). *Économie et société*. Plon.

Zizek, S. (2004). *La subjectivité à venir*. Flammarion.

Biographical Note

Vincenzo Susca is associate professor in sociology at the University Paul Valéry, Montpellier (Laboratoire d'Études Interdisciplinaires sur le Réel et les Imaginaires Sociaux). He is the director of the publishing series *L'Imaginaire et le Contemporain* (The Imaginary and the Contemporary) for Liber Éditions (Canada). His latest books translated into Portuguese are *As Afinidades Conectivas* (Connective Affinities; Sulina, Porto Alegre, 2019), *Aurora Digital* (Digital Aurora; Sulina, Porto Alegre, 2019, with Claudia Attimonelli), and *Tecnomagia* (Technomagic; Sulina, Porto Alegre, 2023).

ORCID: https://orcid.org/0000-0002-5489-6514
Email: vincenzo.susca@univ-montp3.fr
Address: Université Paul-Valéry Montpellier 3, Route de Mende 34199 Montpellier Cedex 5, France

Submitted: 14/02/2023 | Accepted: 07/06/ 2023

Comunicação e Sociedade, vol. 44, 2023, e023018
https://doi.org/10.17231/comsoc.44(2023).4828

Portuguese Party Leaders on Twitter: Interactions and Media Hybridisation Strategies

Vítor Gonçalves
Centro de Investigação e Estudos de Sociologia, Escola de Sociologia e Políticas Públicas, Instituto Universitário de Lisboa, Lisbon, Portugal

Abstract

This study aims to understand to what extent Portuguese political party leaders use the interactions accessible on Twitter, namely the retweets, mentions of other users and hyperlinks, and to observe which connection networks are created — whether within the party or outside of it, such as citizens or political actors from other parties. Additionally, we verify how political actors use Twitter to implement a strategy in the hybrid media system model, establishing links to "traditional media" such as newspapers, radio, and television. The data comprises tweets published by four Portuguese party leaders, from Partido Socialista, Partido Social Democrata, Bloco de Esquerda and Chega, during 2021 and 2022, subsequently subject to content analysis using the MAXQDA program. The research revealed that all leaders use Twitter's interaction possibilities but with different intensities. We verified that they all employ a hybrid communication strategy by converging traditional media content in the Twitter platform. We establish a typology of communication strategies party leaders implement on Twitter from the obtained data. We also identify and characterise the possibilities that media interactions conducted by party leaders can assume in the Twitter arena.

Keywords

political actors, Twitter, Twitter interaction, hybrid media system

Os Líderes Partidários Portugueses no Twitter: Interações e Estratégias de Hibridização Mediática

Resumo

Este estudo procura perceber até que ponto os líderes partidários portugueses utilizam as possibilidades de interação acessíveis no Twitter, nomeadamente o *retweet*, menção a outro utilizador e ligação *web* para outros endereços, e entender qual é a rede de ligações que é criada — se dentro do próprio partido, se aberta a protagonistas partidários de outras forças políticas ou a cidadãos. Adicionalmente, verificamos como é que, através do Twitter, os atores políticos põem em prática uma estratégia enquadrada no modelo mediático híbrido, estabelecendo ligações para os chamados "meios tradicionais de comunicação", como jornais, rádio e televisão. Os dados são obtidos a partir de uma recolha de *tweets* publicados por quatro líderes partidários portugueses, do Partido Socialista, Partido Social Democrata, Bloco de Esquerda e Chega, em períodos específicos de 2021 e 2022, posteriormente sujeitos a análise de conteúdo e trabalhados informaticamente através do programa MAXQDA. A pesquisa revelou que todos os líderes utilizam as possibilidades de interação do Twitter, mas com intensidades diferentes. Verificámos que apostam numa estratégia de comunicação híbrida, fazendo convergir na plataforma do Twitter conteúdos dos média tradicionais. A partir dos dados obtidos foi possível estabelecer uma tipologia de estratégias de comunicação postas em prática pelos líderes partidários no Twitter, bem como identificar e caracterizar as possibilidades que as interações mediáticas, realizadas pelos líderes partidários, podem assumir na arena do Twitter.

Palavras-chave

atores políticos, Twitter, interação no Twitter, sistema mediático híbrido

1. Introduction

The communication landscape has changed profoundly in recent decades, significantly impacting political communication. During the second half of the 20th century, political campaigns primarily relied on mass media — television, radio, and print (Norris, 2000), considered central elements for successful communication (Burton et al., 2015; Stromer-Galley, 2014). Political communication was thus fundamentally a mediated process, filtered through channels such as the media and political parties, which bridge leaders to the public (Pfetsch & Esser, 2012).

This scenario has taken on new contours with the advent of social networks or social media (Murthy, 2012), which have quickly been adopted and integrated into the communication strategies of political actors and parties across various ideological spectrums and latitudes.

The innovations in how political actors, the media and citizens — central elements of political communication (McNair, 2017) — interact through digital communication have prompted some authors to suggest the emergence of a fourth age of political communication (Blumler, 2013). This era is manifested by the systematic combination of interactive and network-based digital communication features within a pre-defined and user-friendly digital architecture, which has emerged on the web through, for example, practices like blogging (Enjolras, 2014). Indeed, the internet has revolutionised the political arena, significantly altering the speed and scope of communication (Castells, 2011). Social media has become a new player in the world of political campaigns (Stromer-Galley, 2014).

Enjolras (2014) points out that this new media-centred communication model entails radical changes relative to the communication channels (from few to many), audience (from unified to diversified), transmission (from one-way to interactive), and user's role (from passive to active). These transformations affecting the dominant communication model in advanced societies affect all forms of communication, including political communication (Enjolras, 2014). Thus, on top of direct contacts, rallies, debates and television interviews, communication methods prevalent in the 20th century that remain so today, tools such as Facebook, Instagram, WhatsApp and, among others, Twitter[1],

[1] This work was produced before the social network's rebranding from Twitter to X. The manuscript was submitted to the journal in May, and Elon Musk announced the name change in July. Nevertheless, the manuscript was not altered to reflect the change. This decision was based on two factors: the continued recognition of "Twitter" by the general public, particularly non-users, and the substantial effort required to revise other related terminology if the text were to be corrected.

have added new avenues of communication. Consequently, integrating social media into politics now coexists with traditional media and has profoundly transformed how voters make their decisions regarding their chosen leaders (Gainous & Wagner, 2014).

By enabling access to millions of potential voters and facilitating direct interaction with fellow politicians and citizens, social networks have established an extra political platform for campaigns (Baumman et al., 2016). Hence, candidates and political parties increasingly employ social media to produce and disseminate their messages, seeking to influence voters' perceptions and behaviour directly (Zamora-Medina et al., 2017), bypassing journalistic mediation (Cammaerts, 2012).

In this context, Twitter has a set of characteristics that make it a particularly interesting tool for political use. On the one hand, it facilitates the immediate, rapid and widespread dissemination of information (Kwak et al., 2010); on the other, its open and horizontal nature and its ability to engage in real-time debates on various issues (Lee et al., 2016) have made it a platform with a notable impact on the process of shaping public discourse. In other words, Twitter enables broad (one-to-many) and interactive communication, which calls for user participation, stimulating network dialogue (Graham et al., 2013).

Axel Bruns (2012) states that Twitter is relatively flat and simple: messages from users are either public and visible to all (even to unregistered visitors using the Twitter website) or private and visible only to approved "followers" of the sender; there are no more complex definitions of degrees of connection (family, friends, friends of friends) as they are available in other social networks. Tweets' nature is "globally public by default" (Bruns, 2012, p. 1324), allowing discussions on specific topics to be automatically organised through shared conversation markers. The short format of each tweet, initially 140 and currently 280 characters, could be seen as a limitation to debate. However, according to Boyd et al. (2010), this characteristic can be an advantage: "the brevity of messages allows them to be produced, consumed, and shared without a significant amount of effort, allowing a fast-paced conversational environment to emerge" (p. 10). From an optimistic standpoint, Twitter would make it possible to reduce the distance between citizens and politics (Coleman & Blumler, 2009), which is evident in areas such as reducing electoral abstention by encouraging voter engagement in debates on public issues and promoting their active involvement in politics. However, certain studies cast doubt on its real influence in determining the most relevant issues in public opinion (Calvo & Campos-Domínguez, 2016).

The rise of new media and its growing impact has led to a distinction between new and traditional media. However, this division has been challenged by Chadwick (2013), who viewed the "new" and "old" dichotomy as inaccurate and misleading. Instead, he argued that we are witnessing a convergence of practices and strategies between new and traditional media platforms, forming a hybrid media system.

2. Hybrid Media System

On December 12, 2021, during the pre-campaign for the legislative elections in Portugal, the leader of the Partido Social Democrata (PSD; Social Democratic Party), Rui Rio, posted a text on Twitter (Figure 1) that triggered extensive responses within the Portuguese media and political sphere.

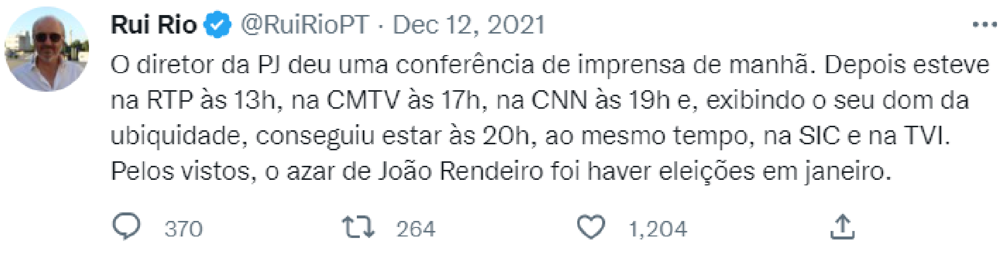

Figure 1. *Rui Rio's tweet on the communication strategy of the director of the Judicial Police*

Source. From *O diretor da PJ deu uma conferência de imprensa de manhã. Depois esteve na RTP às 13h, na CMTV às 17h* [Tweet], by Rui Rio [@RuiRioPT], 2021, Twitter. (https://twitter.com/RuiRioPT/status/1470003993892036617)

Note. The director of the JP held a press conference this morning. Then he was on RTP at 1 pm, CMTV at 5 pm, CNN at 7 pm and, using his gift of ubiquity, he managed to be on SIC and TVI simultaneously at 8 pm. Apparently, João Rendeiro's bad luck was that there were elections in January.

Rui Rio was commenting on the interviews given by the national director of the Judicial Police to television networks following the arrest of a former banker. The main Portuguese media outlets (Dinis, 2021; PCP Acusa Rio de Querer "Dar Ordens à PJ" Sobre "Quem Pode ou Não" Ser Detido, 2021; Rui Rio Sugere que Calendário Eleitoral Influenciou Prisão de Rendeirot, 2021) reported on the tweet that dominated more than a third of a 30-minute interview with Rui Rio himself on RTP, two days later (RTP Play, 2021). Even the President of the Republic referred to the tweet (Conceição, 2021). This emphasises that a mere 220 characters shared on the social platform Twitter managed to gain significant coverage in television, radio, and newspapers. A post on a new medium became headline news and "fuelled" the traditional media. This exemplifies the concept of communication of communication where journalists produce news "based on what has already been shared by individuals or organisations through the various forms of media available" (Cardoso, 2023, p. 288). This case is also a demonstration of the dynamics of what Chadwick (2013) defines as a "hybrid media system", characterised by the amalgamation of media platforms that have been used for decades and those that have appeared more recently. The outcome is the blend of old and new media within a media system where clear distinctions are dissolving and hard to establish (Chadwick, 2013).

Political communication processes will take on new contours. Within a hybrid media system, political communication unfolds as a dynamic, evolving process concerning multiple actors interacting in response to one another through different media outlets and according to many different media principles (Chadwick, 2013). In this context, Twitter is just part of a growing and increasingly complex media ecology encompassing traditional media's political coverage and political-related interactions across various online channels (Chadwick, 2013).

In the everyday communication practices of political actors on Twitter, hybridisation can manifest in several ways. One such manifestation involves referring to other media, which could entail linking to content like published articles, broadcast reports, photos, or excerpts from television and radio appearances. It might also involve announcing upcoming appearances on programs to enhance their reach and audience or providing links to newspaper news articles and comments. These forms of convergence allow the political actor to directly inform their followers without any mediation about their past and future appearances in other media and to comment on or advertise the content presented in those media, particularly those that directly concern them. This is relevant in political communication strategy: through Twitter, nothing remains limited to its original post, and should the party leader choose to do so, they can respond to anything published.

Aware of this fact, party communication machines, especially during election campaigns, use Twitter and other social media tools regularly and simultaneously with traditional media to engage with voters and influence news cycles and campaign narratives (Kreiss, 2014; Parmelee & Bichard, 2012). The advantage of such an approach lies in its ability to reach voters who are not actively seeking political information but, when using social media, might be accidentally exposed to news and campaign information posted by friends and connections on platforms such as Twitter (Morris & Morris, 2017).

Several studies have explored how political parties use Twitter in their communication strategies, revealing distinctions between recently established and long-standing parties. For instance, Amparo López-Meri et al. (2017) noted a greater Twitter presence among new political forces, citing the following reasons: emerging parties, with less access to traditional media than long-standing parties, aim to maximise the visibility of their appearances in prominent media outlets, particularly on television, by using Twitter; hybridisation is used to get many retweets and "likes" to ensure a double effect: obtaining better publicity and becoming a topic of interest for the media by building a large audience; the parties seek to benefit from the legitimising power of mainstream media, leveraging their appearances in traditional media to present themselves as a credible, valid, and acceptable political option (López-Meri et al., 2017). Despite being rooted in social media, emerging parties are also aware of the importance of mainstream media in modern society and the need to bridge the gap between old and new media (Casero-Ripollés et al., 2016). In a similar vein, Ramos-Serrano et al. (2016) observed that in the 2014 European elections in Spain, traditional political parties primarily employed Twitter as a one-way communication tool, while new parties took better advantage of Twitter's interactive features. Authors such as Jurgens and Jungherr (2015) have also identified differences in Twitter usage strategies between traditional and new parties.

3. Connections and Interactivity on Twitter

As a communication tool, Twitter opens up a whole new field of interactive possibilities. In addition to posting texts and images (photos, graphic compositions or videos) and sending direct messages, the platform includes a set of features through which the user can connect and communicate with other users in several different ways (Bruns & Burgess, 2012), for example through mechanisms such as retweeting, mentioning other users and sharing links to external content — hyperlinks. Within a networked public space, Twitter allows one-to-one, one-to-many and many-to-many communication (Enjolras, 2014).

Interactivity can be defined as the capacity of communication systems to initiate the exchange of messages among participants, resembling a form of interpersonal communication (Rafaeli & Sudweeks, 1997). Stromer-Galley (2004) distinguishes between interactivity as a process — the focus is on the interaction between people; and interactivity as a product — the focus is on interaction mediated through technology.

López-Rabadán and Mellado (2019) note that the existence of bidirectional or multidirectional feedback is a prerequisite of the interactive experience, which is also characterised by the existence of a mediated channel, interchangeable roles among the participants, and a strong "third-order dependence" (p. 3; the need to know, and to be consistent with the information previously shared by the interlocutors). Thus,

> social media (webs, blogs and social networks) are perceived as platforms of high interactivity compared to traditional media, which are more limited in their feedback ability with the audience, at least in their traditional media platforms. (López-Rabadán & Mellado, 2019, p. 3)

These authors draw attention to two key concepts: "reciprocity", which implies real equality of treatment between individuals, and "responsiveness", which is understood as the not-necessarily materialised possibility of interaction (Kiousis, 2002; Lee et al., 2016). Other authors suggest that the communicative dynamic on Twitter relates to these two concepts since they allow direct interactions and reciprocal interactions among users without the need for a full-fledged dialogue (Artwick, 2013; Lewis et al., 2014).

García-Ortega and Zugasti-Azagra (2018) rightly point out that Twitter's significant role in political communication stems from the fact that it allows interactivity, which makes it possible to break with previous communication models based on one-way communication. Like other social networks, Twitter enables, for example, two-way communication between citizens and political leaders without the need for the mediating action of traditional journalistic media (Maarek, 2011). However, some research points out that Twitter's interactive potential between politicians and citizens never materialises, and when it does, it is limited. This limitation can be more pronounced during election campaigns, as political actors prefer controlled interaction (Stromer-Galley, 2014).

Christensen (2013) referred to the notion of a "conversational ecology" in this context of multiple interaction possibilities. This author considers, for example, that retweeting is more than just simple information distribution but also a more complex social engagement whereby the retweet is

> a form of information diffusion and a means of participating in a diffuse conversation as well as an act "to validate and engage with others;" thus, regardless of why users embrace retweeting, through broadcasting messages, they become part of a broader conversation. (Christensen, 2013, p. 651)

On the other hand, "exposure to a politician's microblog page increased a sense of direct interaction (...), which improved both overall impressions and the vote intention" (Lee & Shin, 2012, p. 516), especially considering less affiliative individuals.

Hence, ultimately, we can consider that we are dealing with a new social sphere, the Twittersphere — where a group of individuals come together to share information and experiences (Moinuddin, 2019). This sphere allows users of digital tools to engage more directly in public affairs through direct communication channels and interactions with political actors, fostering citizen-to-citizen communication without the intermediary of traditional media (Stieglitz & Dang-Xuan, 2012). This environment has its own conversational attributes.

> Because Twitter's structure disperses conversation throughout a network of interconnected actors rather than constraining conversation within bounded spaces or groups, many people may talk about a particular topic at once, such that others have a sense of being surrounded by a conversation, despite perhaps not being an active contributor. (Boyd et al., 2010, p. 1)

As such, "social media has enabled conversations to occur asynchronously and beyond geographic constraints, but they are still typically bounded by a reasonably well-defined group of participants in some sort of shared social context" (Boyd et al., 2010, p. 1).

This study interprets the concept of interaction on Twitter as a political actor's strategic communication decision to include in their Twitter feed: (a) Twitter content produced by other users through retweets; (b) references to other users of the platform with a direct link using (@) mentioning their name; and (c) links to external content produced by others, namely traditional media, by including web addresses. It is worth noting that a single tweet can incorporate one, two, or all three of these connection possibilities. This type of interaction has a very relevant characteristic for political communication: by initiating a "conversation" with other users, the political actor is able to have this contact witnessed and eventually participated in by their followers, thus expanding the reach of this content within a networked communication environment (Cardoso, 2009). Therefore, in this study, we will consider how the political actors analysed use these three interaction mechanisms allowed by Twitter: retweets, mentions of other Twitter accounts and the inclusion of hyperlinks or web addresses.

4. Interaction Mechanisms

4.1. Retweet

A retweet is an action that allows a user to share, on their own Twitter feed, a tweet originally published by another user, thereby exposing it to their followers and expanding the reach of the original tweet. Retweets are thus a means of redistribution. By retweeting, the user creates or becomes part of a broader "dialogue", actively participating in the ongoing "conversation". "Structurally, retweeting is the Twitter-equivalent of email forwarding where users post messages originally posted by others" (Boyd et al., 2010, p. 1).

There are multiple reasons for a user to retweet. Firstly, it can mean support, approval or "endorsement" of a specific piece of content that, for that reason, the user is keen to repost in their feed and thus increase their visibility. However, in political communication, retweeting can also be used to make an ironic point or expose something considered a misjudgement by another user. These situations are usually complemented by a comment or reaction from the retweet's author explaining their standpoint. Whatever the reason for the retweet, this action always shows interest (typically positive, although it can also be ironic or a complaint) and gives remarkable visibility to the activity of a certain user. (López-Rabadán & Mellado, 2019).

Boyd et al. (2010) have listed several motivations that drive users to retweet: to amplify or spread tweets to new audiences; to entertain or inform a specific audience or as an act of curation; to comment on someone's tweet by retweeting and adding new content or starting a conversation; to make one's presence as a listener visible; to publicly agree with someone; to validate others' thoughts; as an act of friendship, loyalty, or homage; for self-gain, either to gain followers or reciprocity from more visible participants; to save tweets for future personal access. These authors emphasise that retweeting is more than the simple distribution of information. It translates into a more complex social engagement. It is an action taken "to validate and engage with others" (Boyd et al., 2010, p. 1). Thus, "regardless of why users embrace retweeting, through broadcasting messages, they become part of a broader conversation" (p. 10). As part of such conversations, retweeting "contributes to a conversational ecology in which conversations are composed of a public interplay of voices that give rise to an emotional sense of shared conversational context" (Boyd et al., 2010, p. 1).

Previous academic studies examining how political figures use Twitter's interaction tools have provided insights. Firstly, interactions directly affect content dissemination: each interaction pushes the original content through the network structure in a different way. The added content can reinforce the original message, but it can also change it by criticising it or using irony (Baviera et al., 2019). Meraz and Papacharissi (2013) noted that retweets are often driven by the perceived value of the tweet's content (rather than, for example, the person who tweeted). Hansen et al. (2011) noted that the determining factors for a message to be retweeted "may depend on the type of content and whether the communication is intended for a broader audience or a more closed community of friends" (p. 6).

A study focusing on Spanish politicians' activity on Twitter (López-García, 2016) concluded that retweets clearly serve to promote and rebroadcast the political message and shore up the party's base. Regarding mentions of other users' accounts, the research highlighted differences between party leaders: some interact with a significant number of accounts, whose owners, moreover, start the interaction by asking questions or, occasionally, criticising certain measures or proposals of their party; other party leaders use mentions to thank other candidates for their work or to respond to mentions made by official accounts (López-García, 2016).

4.2. Mention (@)

The mention (username preceded by the "@" character) allows a direct reference to another user, integrating them into the message, drawing attention to or prompting interaction with the user mentioned. On the other hand, anyone who reads the tweet can link directly to the name mentioned. The fact that different mentions (@1, @2, @3, etc.) can be included in the same tweet makes it the most appropriate, direct and complete interaction tool available on Twitter (López-Rabadán & Mellado, 2019). The mention can be used as a mechanism for informally initiating a digital conversation with known or unknown users, thus becoming a public invitation to digital dialogue with enormous strategic utility for political journalists (López-Rabadán & Mellado, 2019).

4.3. Weblink

Twitter allows users to add a link to another web address in a post involving any type of content. It is a mechanism to surpass the traditional space limitation of this network by linking to more complete content (textual and audiovisual). In this manner, users lead their followers to additional information that can be developments on the topic covered in the tweet, proof of verification of the thesis being put forward or important references that validate the opinion expressed in the original tweet. The interaction capacity of links is also limited, but especially linked to other mechanisms, such as retweeting or mention (@), it offers the possibility of indirectly approaching content produced by media, parties or political actors (López-Rabadán & Mellado, 2019). Political actors have often used this mechanism to add references to media content where they or their party are quoted to their Twitter feed, in a convergence process between new and traditional media.

5. Method, Research Questions and Research Hypotheses

We focused our analysis on the tweets published by party leaders: António Costa, Prime Minister — @antoniocostapm — during the regular periods, local elections and debate on the state budget, and secretary-general of the Partido Socialista (PS; Socialist Party), — @antoniocostaps — during the parliamentary elections pre-campaign and campaign period; Rui Rio, president of the PSD — @ruiriopsd; Catarina Martins, coordinator of the Bloco de Esquerda (BE; Left Bloc) — @catarian_mart; and André Ventura, president of Chega - @andrecventura. This choice enables the coverage of the Twitter presence of the leaders of the prominent parties in Portuguese politics — PS and PSD — as well as the leaders of new parties on the left (BE) and the right (Chega) wings.

The tweets were collected from a longitudinal perspective, spanning five different periods: the regular period — May 15 to June 15, 2021 (a period with no significant political events); the local elections period — September 1 to 28, 2021; the state budget debate period — October 11 to 28, 2021; the parliamentary pre-campaign and campaign period — December 8, 2021, to January 31, 2022. The number of tweets posted by each party leader over the four periods is shown in Table 1.

	Regular	Local	Budget	Parliamentary	Total
André Ventura	101	128	59	233	521
António Costa	108	53	42	309	512
Catarina Martins	63	98	37	182	380
Rui Rio	40	39	10	74	163
Total	312	318	148	798	1,576

Table 1. *Tweets posted per leader/period*

This collection formed our database, from which we conducted a content analysis (Bryman, 2012) of the tweets, using the MAXQDA program and producing the outputs in a spreadsheet.

5.1. Research Questions

The research queries (RQ) for which we seek answers are as follows:

RQ 1. To what extent do party leaders establish connections on Twitter, and what is their typology — retweets, mentions of other users' accounts, and inclusion of web addresses?

RQ 2. When these connections are established, who is the object of these connections — party affiliates, other political parties, the media, or the citizens?

RQ 3. To what extent do party leaders use a media hybridisation approach in their communication strategy on Twitter, incorporating content from traditional media into their posts?

RQ 4. In cases where the hybridisation strategy is used, what forms does it take?

5.2. Research Hypotheses

Our hypotheses are outlined as follows:

Hypothesis 1. Party leaders interact on Twitter, using the medium's various possibilities — retweets, account mentions, and hyperlink incorporation.

Hypothesis 2. Party leaders' primary interactions are within their party circle and with the traditional media.

Hypothesis 3. Party leaders use a hybridisation strategy, and the leaders of recently established parties do so more frequently than the leaders of longer-standing parties.

Hypothesis 4. Party leaders use the hybridisation strategy on Twitter to signal their presence in the traditional media, disseminate excerpts from these contributions or react to content published in the traditional media.

6. Discussion of Findings

6.1. Connections

Connecting on Twitter is a communication strategy with two important functions. On the one hand, it guides followers to content created by others they consider relevant.

On the other hand, it meets the need for posting and feeds content into their own Twitter feed. In this analysis, the first distinction shows how much the resource is used (Figure 2). Thus, we classify a tweet as not connected when it does not include retweets, mentions of another account or a web address, and a tweet is considered connected when it includes at least one of these three link types.

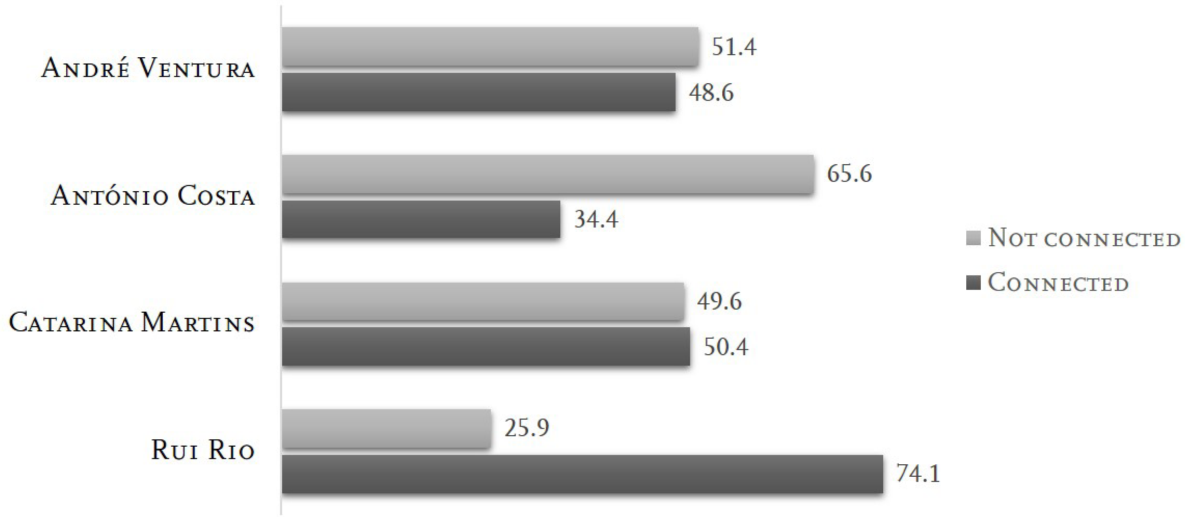

Figure 2. *Party leaders' connections (%) on Twitter*

The graphical analysis shows that the main difference is between the strategy of António Costa and Rui Rio. The PS leader has more of his own tweets and fewer links: most posts do not include a connection (65.6%); around 1/3 of his tweets do (34.4%). Thus, about 2/3 of the PS leader's tweets are his own content with no other network references. Rui Rio is the party leader with the highest percentage of connections (74.1%); the number of tweets with no connections is the lowest of the four leaders analysed (25.9%). André Ventura has just over half of his tweets (51.4%) with no connections to the web, while the remainder include (48.6%). A similar pattern can be found in Catarina Martins' practice: half have hyperlinks (50.4%), and the other half do not (49.6%).

6.2. Types of Interaction

The web's interaction potential allows political actors to further their communication with other political figures and organisations, citizens, and the media. The data (Figure 3) shows that André Ventura primarily establishes connections through web addresses (88.8%). Only 11.2% are retweets, and no reference to personal accounts. António Costa incorporates retweets (50.8%) in his posts, mentions of other accounts (30.7%) and, to a lesser extent, references to other web addresses (18.5%). Catarina Martins predominantly employs retweets (39.9%), followed by mentions of accounts (33.2%) and, in third place, hyperlinks (26.9%). The main form of connection in Rui Rio's tweets is the hyperlink (47.9%), then the retweet (45.9%) and, thirdly, the mention of accounts (6.2%).

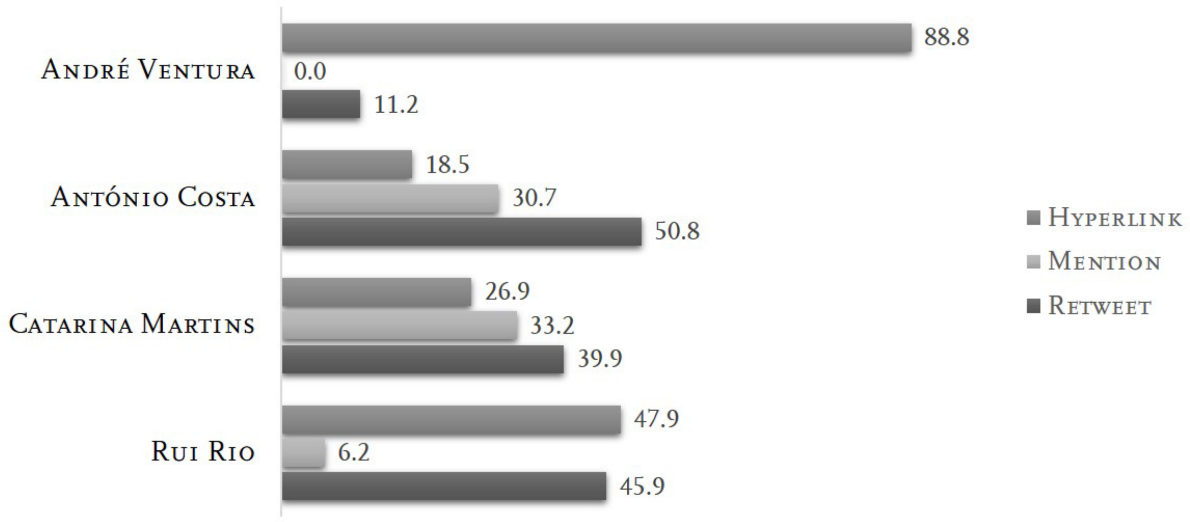

Figure 3. *Party leaders' types of interaction (%) on Twitter*

Thus, we can identify three different communication strategies for using these functionalities. António Costa and Catarina Martins follow a similar strategy, prioritising retweets, followed by mentions and, lastly, web addresses. Rui Rio retweets and hyperlinks almost equally, with fewer mentions to other accounts. Conversely, André Ventura predominantly opts to add web addresses, retweets sparingly and does not use the possibility of mentioning other users' accounts. These figures show that André Ventura does not use tweets to refer to other protagonists by mentioning their accounts, and the number of retweets is also quite low, primarily related to media publications.

When any of the three types of interaction are incorporated, we have identified three possibilities: links to party circles, the media or citizens. Regarding party circles, there are five hypotheses: the party itself or its internal organisations (party youth wing or parliamentary group, for example); political actors within the party; competing political actors or parties; the Portuguese Government or its internal organisations; international political actors, parties, governments or political institutions.

6.3. Retweet

The four leaders have different retweet practices (Figure 4). António Costa primarily uses retweets to amplify content from his own party's Twitter feed or internal organisations (80.6%). However, this happens almost exclusively during the parliamentary elections' pre-campaign and electoral campaign periods. He also retweets content from the Government or Government organisations (11.8%). In third place are the tweets from politicians, parties, governments or international political institutions (4.3%). It should be noted that the PS leader posts a limited number of tweets from political actors within his own party (3.2%). António Costa uses an institutional retweet strategy that refers to tweets produced by organisations or institutions rather than individual political actors.

One possible explanation could be that António Costa does not want to signal preferences for individual political actors. For a political actor, a retweet can be interpreted as a preference and thus have a political reading. Firstly, it can be seen as an endorsement or support for a particular piece of content and its author. Perhaps to prevent such interpretations, António Costa retweets a very small number of individual tweets, whether from his ministers, members of his board or party militants, opting instead for retweets from organisations or institutions linked to his political sphere.

Figure 4. *Party leaders' object of retweet (%) on Twitter*

André Ventura retweets mostly to disseminate media content (79.3%), often related to himself or his party. Mentions of André Ventura on traditional media's Twitter accounts are promptly echoed on Ventura's own Twitter feed, thereby broadening the reach of the original message. Retweets from the party or affiliated organisations come next (17.2%), and in third place are retweets from international political figures, parties, governments, or political institutions (3.4%). Within this latter dimension, we find retweets from leaders of their own European political family, mainly focussing on bilateral contacts.

Catarina Martins retweets almost entirely within her party circle: her party or its affiliated organisations (54.7%) and politicians from her party (41.9%). Thus, Catarina Martins' Twitter feed replicates tweets from the BE (Figure 5), the parliamentary group, members of Parliament, members of the European Parliament, and BE regional leaders — publications from the various party branches are visible on Catarina Martins' Twitter feed.

Figure 5. *Catarina Martins — Bloco de Esquerda retweet*

Source. From *Temos que reconhecer que há um problema de racismo nas forças policiais em Portugal, avisa @JoanaMortagua [Tweet]*, *by Bloco de Esquerda* [@BlocoDeEsquerda], 2021, Twitter. (https://twitter.com/BlocoDeEsquerda/status/1471625514284691461)

Note. We need to acknowledge that there is a problem of racism within the police forces in Portugal, warns @JoanaMortagua. We can't look at cases like Odemira's as if they were isolated. It was an organised group that hunted down immigrants, and the problem of racism must be addressed.

Rui Rio's retweets are essentially within his party's circle. Firstly, his party or its affiliated organisations (50.8%) — PSD, Juventude Social Democrata (Social Democratic Youth), parliamentary group and others — and secondly, from politicians within his party (35.4%), particularly those who hold positions in his leadership. Media retweets come in third place (10.8%).

6.4. Mentions of Accounts

The first aspect worth highlighting is that André Ventura's Twitter account does not make any connections with the accounts of other personalities (Figure 6). On André Ventura's Twitter account, he is practically the only protagonist. Given that Chega is a highly personalised party whose leader dominates practically all communication by ignoring the names of other party personalities and not making any references to them, it may suggest an effort to reinforce his central role as the party's public face in the eyes of his followers.

Figure 6. *Party leaders' object of mention (%) on Twitter*

On António Costa's Twitter account, a notable aspect is that the most frequent mentions are of accounts belonging to international politicians, political parties, governments, or political institutions. A more detailed analysis shows that this primarily stems from his role as Prime Minister. Thus, whenever António Costa engages in meetings with political leaders from other countries, he includes the accounts of the leaders or institutions he connected to on his Twitter feed. For example, at a summit with the

President of the Government of Spain, António Costa mentions in his post both Pedro Sánchez's (the President of the Government) account and the account of the Moncloa (the official residence of the presidency of the Government of Spain). As part of his role as Prime Minister has an international dimension, António Costa expresses this in his tweets. That is a distinguishing mark compared to the other party leaders, who have more limited access to the international political arena. During the election campaign, the PS secretary-general used a similar approach and mentioned the accounts of international leaders from his political family, such as the account of the leader of the Social Democratic Party of Germany and the German Chancellor with messages of support for the PS campaign (Figure 7). In second place, António Costa's Twitter account mentions government accounts and Portuguese government institutions (24.2%).

Figure 7. *António Costa's tweet mentioning Olaf Sholz's account*

Source. From *Obrigado pelo apoio, amigo @OlafScholz! Na Europa, como em Portugal, seguimos juntos no combate por uma sociedade mais justa e progressista* [Tweet], by António Costa [@antoniocostaps], 2022, Twitter. (https://twitter.com/antoniocostaps/status/1486291700435849218/)

Note. Thank you for your support, my friend @OlafScholz! In Europe, as in Portugal, we fight together for a fairer and more progressive society, a strong welfare state and a policy that consistently places citizens at the core of our initiatives.

In Catarina Martins' posts, the most mentions are directed towards accounts of BE politicians (59.3%), mainly MPs and leaders, and to the party's own account (10.7%). The mentions of media accounts (18%) mainly establish a quicker link to Catarina Martins' interviews or appearances in those media.

Rui Rio predominantly mentions accounts of politicians within his own party (63.6%) and, secondarily, accounts of international politicians, parties, governments, or political institutions (27.3%). In the latter case, he references meetings with international leaders from his political family or within the context of international organisations to which the PSD is affiliated, such as the European People's Party. In third place, he mentions the party itself or its affiliated organisations (9.1%).

6.5. Connecting on the Web

The inclusion of web addresses was noted earlier as the main connection mechanism used by André Ventura on Twitter (Figure 8). This communication strategy aims to establish links with the media outlets, which is the main destination for the hyperlinks (96%). Thus, all references in the media universe involving the name of André Ventura and his party are shared on his Twitter account (Figure 9).

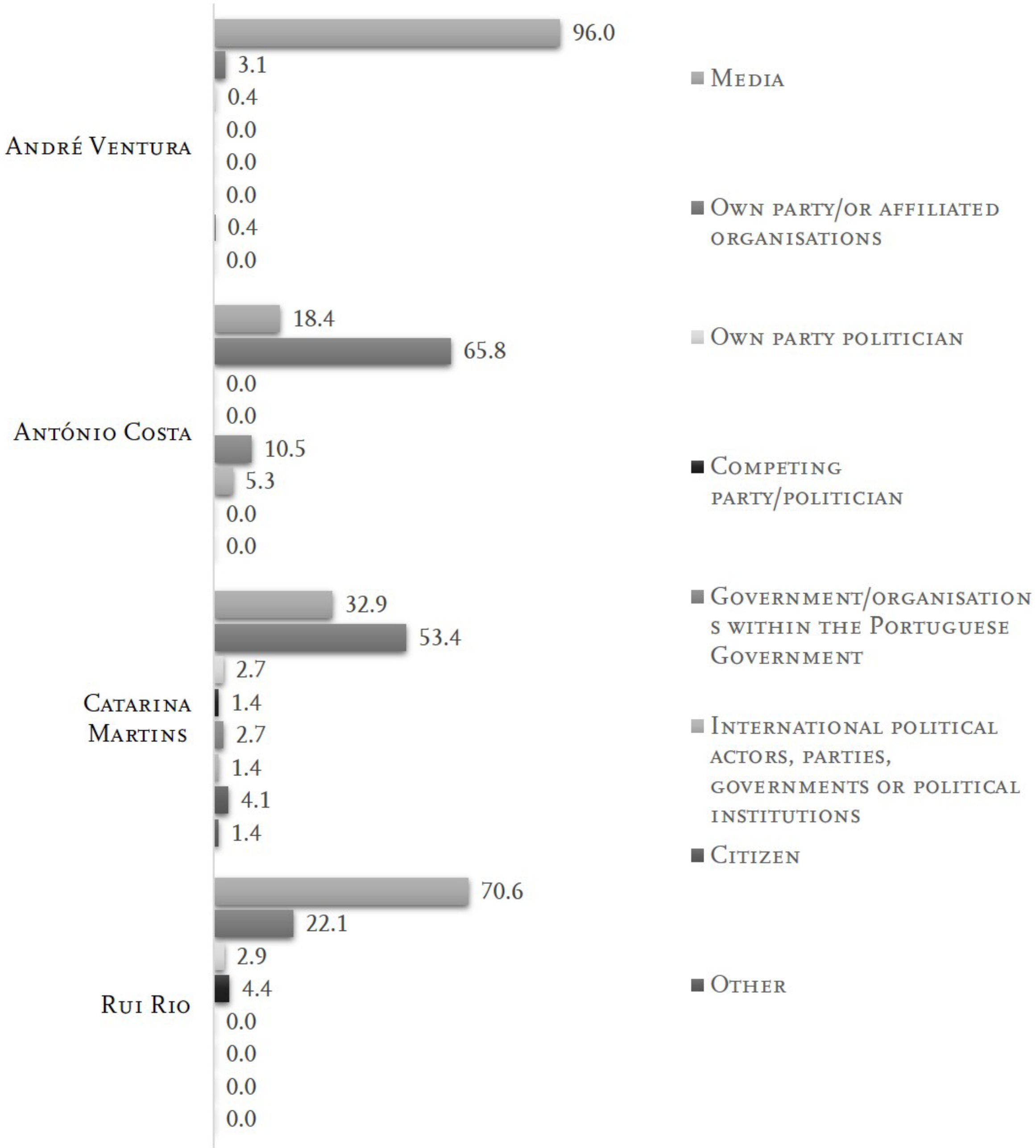

Figure 8. *Party leaders' object of links to web addresses (%) on Twitter*

Figure 9. *Tweet by André Ventura containing a link to media content: television*

Source. From *3.1 mil milhões foram pagos em subvenções indevidas ou sem controlo. Depois não há dinheiro para salários e pensões!* [Tweet], by André Ventura [@AndreCVentura], 2022, Twitter. (https://twitter.com/AndreCVentura/status/1484906476590272517)

Note. 3,1 billion were disbursed in undue or uncontrolled subsidies. Then there's no money for salaries and pensions! This is where the money from our brutal taxes goes.

Rui Rio uses a similar strategy, but to a lesser degree: the main link he establishes is to the media (70.6%), primarily to react to publications in the traditional media, either about general politics or directly involving him. In the second place, he uses web addresses to his own party or party organisations (22.1%). References to competing politicians or parties (4.4%) and politicians from his party (2.9%) follow.

António Costa's case shows that most links established are with his own party (65.8%). This was particularly evident during the parliamentary election campaign when PS' tweets were systematically replicated via hyperlinks on the leader's account. Secondly, but by a significant margin, there were links to the media (18.4%) and, thirdly, the Portuguese Government or Government organisations (10.5%). We also identified links to international politicians, parties, governments or political organisations (5.3%). There were no links to competing politicians or parties, politicians from his own party or citizens. Thus, António Costa's Twitter strategy tends to remain within the boundaries of his party, emphasising his party through a form of "self-referentiality" (García-Ortega & Zugasti-Azagra, 2018). Catarina Martins' strategy has some similarities. She establishes links primarily to her own party or party organisations (53.4%), then to the media (32.9%) and thirdly, to citizens (4.1%).

6.6. Hibridisation: Connecting with the Media

Building on the concept of media hybridisation, which highlights the intersections between new media like Twitter and traditional media — television, print, and radio (Chadwick, 2013), we examined this category to determine which traditional media outlets are the focus of interaction by party leaders on Twitter and to what extent (Figure 10).

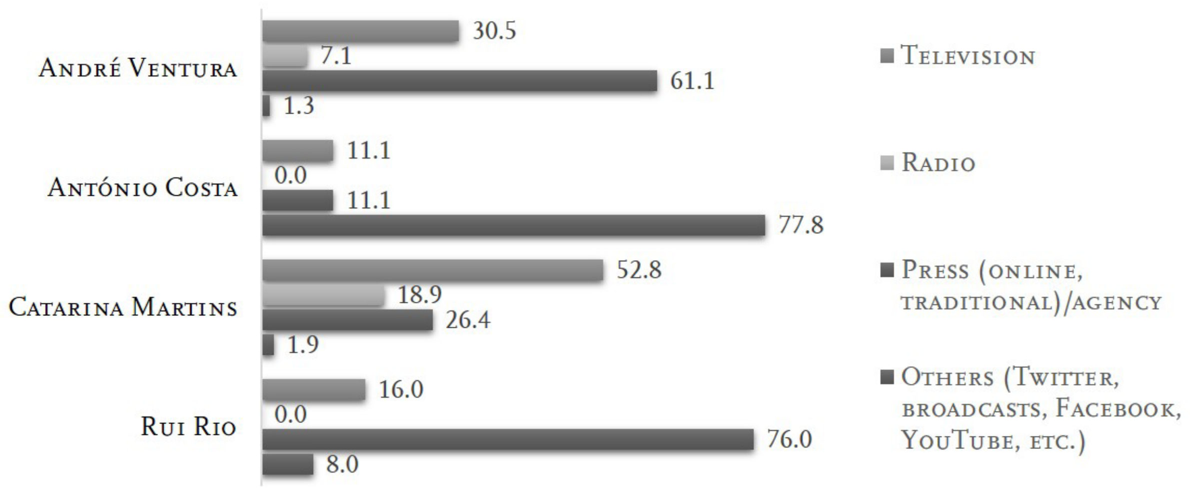

Figure 10. *Party leaders' connection with the media (%) on Twitter*

André Ventura predominantly establishes links with the press (online, traditional, and agencies), accounting for 61.1% of his interactions, primarily relating to news articles about himself. Subsequently, he links to television (30.5%), mainly encompassing interviews and news related to André Ventura, and radio (7.1%).

In António Costa's Twitter connections, the "other" category takes precedence (77.8%), including connections to networks such as YouTube and Facebook. This clearly sets him apart from the other party leaders: António Costa is the party leader who establishes the most connections with new media and the least with traditional media. The press and television appear in second place with the same value (11.1%).

Catarina Martins' primary media connection on Twitter is television (52.8%), followed by the press (26.4%) and, in third place, radio (18.9%) — the traditional media.

On Rui Rio's Twitter account, the press came first (76%), then television (16%) and, lastly, the "other" category (8%).

7. Hybridisation: Typology of Media Interactions

This section investigates how party leaders use the Twitter platform to establish connections with traditional media and examines the type of content that leads to this hybridisation.

We consider three dimensions: (a) announcing participation in media shows, such as interviews and debates, or disseminating content that stems from these participations; (b) sharing news or comments about themselves; and (c) commenting on news or opinions published in the media.

Regarding the first dimension, the fact that political leaders can announce on Twitter their participation in traditional media shows or disseminate content resulting from these participations is a strategy that has several advantages. Firstly, it is a means to promote the show itself, making more citizens, in this case Twitter followers, aware of the event and thus facilitating their engagement with the program. Secondly, it allows leaders to select and edit the content they want to disseminate from their participation, essentially taking on the role of gatewatchers (Bruns, 2005). This practice enables political actors to enter a domain traditionally reserved for journalists. However, while journalists follow editorial criteria for content curation, political actors' criteria are assumed to be driven by political and partisan interests. In other words, political actors can use their Twitter accounts to publish segments of their participation in interviews and debates that align with their communication strategy and political interests.

The second dimension involves the possibility of political actors incorporating news or comments published in the traditional media into their Twitter feeds. This feature allows political leaders to amplify the impact of traditional media publications by making them reach their followers.

Thirdly, on their Twitter account, political actors can comment or react to news or opinions expressed in the traditional media. This practice aligns with the growing phenomenon of media hybridisation. Traditional mass media outlets typically broadcast news and opinions, and it was traditionally the role of journalists to request party leaders' opinions or responses to this content. On the other hand, should there be such reactions, they could be integrated into the next edition, and there was always a time gap between the news and the possible reaction. Twitter has bridged this gap by allowing party leaders to react immediately if they choose to do so. In this case, they can incorporate the content published in the traditional media and their own comments into their Twitter feed.

We shall now examine how party leaders, the focal point of this study, put these interactions into practice (Figure 11).

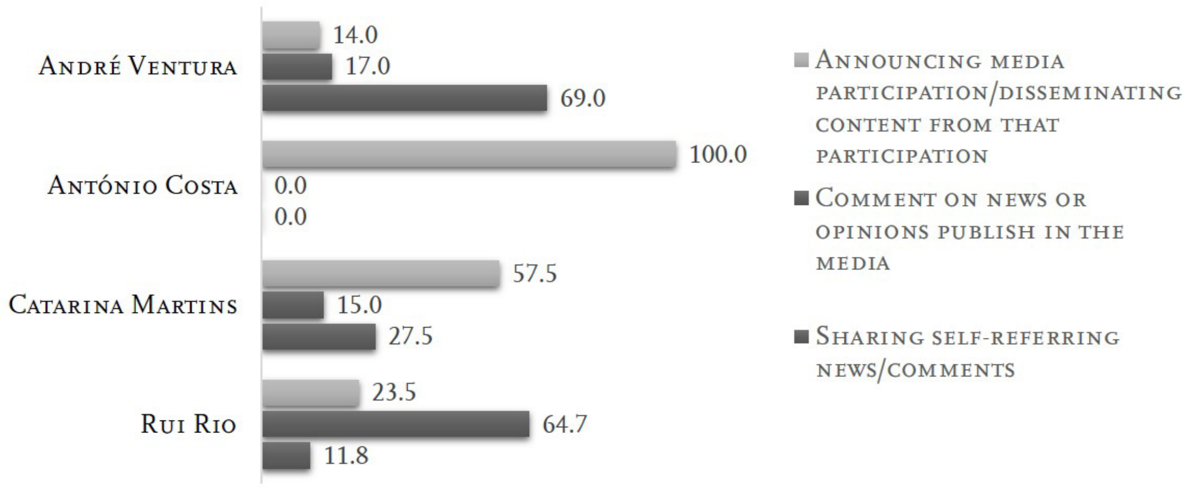

Figure 11. *Party leaders' types of interaction (%) on Twitter*

In André Ventura's case, the emphasis in hybridisation is primarily on sharing news or comments (69%), followed by commenting on news or opinions (17%) and announcing media participation or appearances (14%).

António Costa uses only one of the hybridisation features considered here. The PS leader uses Twitter to announce his presence in the media or disseminate edited content from it. He never shares news or comments about himself or on news or opinions in the media.

Catarina Martins uses all three functions to varying degrees. She predominantly uses the possibility of announcing and promoting content from her media participation (57.5%), followed by sharing news or comments (27.5%) and, finally, commenting on news or opinions (15%).

Rui Rio's strategy has a different approach. Firstly, he comments or reacts to news published in the media (64.7%), often critically or ironically. Secondly, he uses Twitter to promote his participation or content from his participation in media shows (23.5%) and share news from the traditional media (11.8%).

8. Conclusions

The data collected in this research allows for establishing a typology of communication strategies implemented by party leaders on Twitter, which we illustrate graphically (Figure 12).

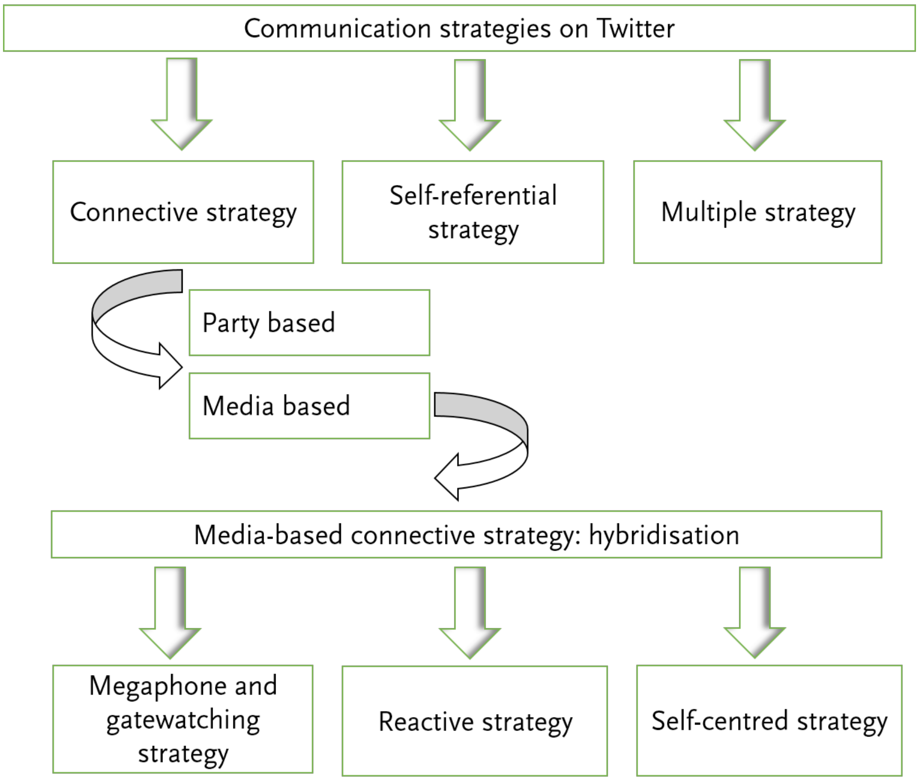

Figure 12. *Typology of party leaders' communication strategies on Twitter. Author's original model*

As per the definitions, the "connective strategy" pertains to communication that centres around creating interactions with other users, often through mechanisms such as retweets, account mentions or hyperlinks. The "self-referential strategy" involves communication primarily disseminating personal and political content relating to the leaders themselves. The "multiple strategy" encompasses communication that combines original content production and establishing connections with other users.

The four party leaders follow the multiple strategy but with subtle variations. António Costa leans more towards a self-referential approach, predominantly using Twitter to disseminate his own content. In contrast, Rui Rio tends to have a more connective approach, as he actively establishes connections via Twitter, particularly to react to news or opinions on national politics. André Ventura and Catarina Martins strike a more even balance between these two possibilities.

The connective strategy can be party-based — when interactions are primarily established with the structures and members within the party circle — and/or media-based — when connections are established with other media, namely traditional media, combining content from television, radio, and newspapers on Twitter, as part of a hybridisation process.

Rui Rio and Catarina Martins are the leaders who most exploit party-based connections. The PSD leader favours interactions with his party and his party's political actors, namely the members of his core group. Catarina Martins employs an "endogamous" approach to Twitter, primarily establishing connections with member of Parliament, members of the European Parliament, leaders and various organisations in her party. In essence, it is a form of communication within the party "bubble", where her followers gain access to the posts of the BE and its key members. Regarding party-based connections, António Costa and André Ventura follow a similar strategy. The PS leader avoids direct interactions with party members, which could be interpreted as expressions of preference or endorsement, opting instead to emphasise his international contacts in the party connections he establishes. André Ventura also establishes very few connections with his party and party members adopting a strategy that tends to favour political personalisation (Van Aelst et al., 2017), a trend in contemporary political communication characterised by the prominence of individuals and their attributes over political parties and ideologies (Swanson & Mancini, 1996).

The media hybridisation strategy encompasses three possibilities: the "megaphone and gatewatching strategy" — when the content posted on Twitter is used to announce future appearances on television, radio, and newspapers (megaphone) or to promote segments of these appearances that they have edited themselves (gatewatching). The "reactive strategy" — when the content posted on Twitter discloses a reaction (comment, response, context, criticism) to content published by other media, particularly traditional media, "me — about the media", sometimes assuming an adversarial position. The "self-centred strategy" — when the content posted on Twitter replicates the references to the leader in the traditional media, positioning the party leader at the centre of communication, "me — in the media".

Portuguese party leaders adopt different hybridisation strategies. António Costa only interacts with the traditional media to announce his participation in shows and disseminate content stemming from these participations — a megaphone and gatewatching strategy — and does not use Twitter to respond, react to or share news and comments. Twitter is thus a platform for displaying his actions rather than debating the ideas surfacing in the media. Catarina Martins follows a similar strategy, using Twitter to announce her participation and share segments of her media presence. Rui Rio predominantly follows a reactive strategy — Twitter is where he comments, reacts or responds to the traditional media, often taking a critical and challenging stance towards the traditional media. The leader of the Chega party heavily relies on media hybridisation, replicating all the references to him in the traditional media on his Twitter account — a self-centred strategy. This practice has three advantages: it suggests to followers that he is a politician with a high profile in the traditional media, highlighting his relevance in the political system; it amplifies the impact of publications in the traditional media by reaching voters who will eventually use the new media to access information; it allows him to add his own comments or explanations to the references made about him, whether favourable or unfavourable. André Ventura's Twitter account tells the story of André Ventura in the traditional media.

In short, all the party leaders use Twitter's interactive potential with different intensities. They use Twitter's interaction methods differently, but mostly in an intra-party context. Twitter stands as a new arena for conversation between actors from the same political-party sphere and a forum for engaging with politicians and traditional media rather than a territory for dialogue with citizens or inter-party communication. It is not possible to determine a pattern of use based on political notions of left/right or older/newer parties; on the contrary, the place that leaders occupy on the political scene — heading the government/leading opposition parties and the individual profile of each party leader are variables that seem to have a greater influence on communication practice on Twitter. The study confirms party leaders' commitment to a media hybridisation strategy, reinforcing convergence between platforms and thus redefining the media environment in which political communication takes place, marked by the communication of communication, which is affirmed as "the communication practice that is both the most common and the most distinctive of our contemporary way of communicating" (Cardoso, 2023, p. 287).

Translation: Anabela Delgado

References

Artwick, C. G. (2013). Reporters on Twitter: Product or service? *Digital Journalism*, *1*(2), 212–228. https://doi.org/10.1080/21670811.2012.744555

Baumman, A., Fabian, B., Lessmann, S., & Holzberg, L. (2016, June 12–15). *Twitter and the political landscape – A graph analysis of German politicians*. 24th European Conference on Information Systems, Istambul, Turkey.

Baviera, T., Calvo, D., & Llorca-Abad, G. (2019). Mediatization in Twitter: An exploratory analysis of the 2015 Spanish general election. *The Journal of International Communication*, *25*(2), 275–300. https://doi.org/10.1080/13216597.2019.1634619

Blumler, J. G. (2013, September). *The fourth age of political communication* [Keynote speech]. Workshop on Political Communication Online, Berlin, Germany.

Boyd, D., Golder, S., & Lotan, G. (2010). Tweet, tweet, retweet: Conversational aspects of retweeting on Twitter. In R. H. Sprague, Jr. (Ed.), *2010 43rd Hawaii International Conference on System Sciences* (pp. 1–10). IEEE. https://doi.org/10.1109/HICSS.2010.412

Bruns, A. (2005). *Gatewatching: Collaborative online news production*. Peter Lang.

Bruns, A. (2012). How long is a tweet? Mapping dynamic conversation networks on Twitter using Gawk and Gephi. *Information, Communication & Society*, *15*(9), 1323–1351. https://doi.org/10.1080/1369118X.2011.635214

Bruns, A., & Burgess, J. (2012). Researching news discussion on Twitter: New methodologies. *Journalism Studies*, *13*(5–6), 801–814. https://doi.org/10.1080/1461670X.2012.664428

Bryman, A. (2012). *Social research methods*. Oxford University Press.

Burton, M. J., Miller, W. J., & Shea, D. M. (2015). *Campaign craft: The strategies, tactics, and art of political campaign*. Praeger.

Calvo, D., & Campos-Domínguez, E. (2016). Participation and topics of discussion of Spaniards in the digital public sphere. *Communication & Society*, *29*(4), 219–234. https://doi.org/10.15581/003.29.4.219-234

Cammaerts, B. (2012). Protest logics and the mediation opportunity structure. *European Journal of Communication*, *27*(2), 117–134. https://doi.org/10.1177/0267323112441007

Cardoso, G. (2009). Da comunicação de massa para a comunicação em rede. In R. Cádima, G. Cardoso, & L. L. Cardoso (Eds.), *Média, redes e comunicação* (pp. 12–48). Quimera.

Cardoso, G. (2023). *A comunicação da comunicação. As pessoas são a mensagem*. Mundos Sociais.

Casero-Ripollés, A., Feenstra, R. A., & Tormey, S. (2016). Old and new media logics in an electoral campaign: The case of Podemos and the two-way street mediatization of politics. *The International Journal of Press/Politics*, *21*(3), 378–397. https://doi.org/10.1177/1940161216645340

Castells, M. (2011). *Communication power*. Oxford University Press.

Chadwick, A. (2013). *The hybrid media system: Politics and power*. Oxford University Press.

Christensen, C. (2013). Wave-riding and hashtag-jumping: Twitter, minority 'third parties' and the 2012 US elections. *Information, Communication & Society*, *16*(5), 646–666. https://doi.org/10.1080/1369118X.2013.783609

Coleman, S., & Blumler, J. G. (2009). *The internet and democratic citizenship: Theory, practice and policy*. Cambridge University Press.

Conceição, R. (2021, December 13). *Marcelo censura Rui Rio pelo "azar de Rendeiro". O ex-banqueiro já está no tribunal*. Observador. https://observador.pt/newsletters/360/marcelo-censura-rui-rio-pelo-azar-de-rendeiro-o-ex-banqueiro-ja-esta-no-tribunal/

Dinis, D. (2021, December 14). Rio insiste: Quem deteve Rendeiro "foi a polícia sul-africana". E o diretor da PJ "fez um foguetório para beneficiar o PS". *Expresso*. https://expresso.pt/politica/2021-12-14-Rio-insiste-quem-deteve-Rendeiro-foi-a-policia-sul-africana.-E-o-diretor-da-PJ-fez-um-foguetorio-para-beneficiar-o-PS-66f991e0

Enjolras, B. (2014, January 8–9). *How politicians use Twitter, and does it matter? The case of Norwegian national politicians* [Conference presentation]. International Conference Democracy as Idea and Practice, Oslo, Norway.

Gainous, J., & Wagner K. M. (2014). *Tweeting to power: The social media revolution in American politics*. Oxford University Press.

García-Ortega, C., & Zugasti-Azagra, R. (2018). Gestión de la campaña de las elecciones generales de 2016 en las cuentas de Twitter de los candidatos: Entre la autorreferencialidad y la hibridación mediática. *El Profesional de la Información*, *27*(6), 1215–1224. https://doi.org/10.3145/epi.2018.nov.05

Graham, T., Broersma, M., Hazelhoff, K., & Van 't Haar, G. (2013). Between broadcasting political messages and interacting with voters. *Information, Communication & Society*, *16*(5), 692–716. https://doi.org/10.1080/1369118X.2013.785581

Hansen, L. K., Arvidsson, A., Nielsen, F., Colleoni, E., & Etter, M. (2011). Good friends, bad news-affect and virality in Twitter. In J. H. Park, L. Yang, & C. Lee (Eds.), *Future information technology* (pp. 34–43). Springer. https://doi.org/10.48550/arXiv.1101.0510

Jurgen, P., & Jungherr, A. (2015). The use of Twitter during the 2009 German national election. *German Politics*, *24*(4), 469–490. https://doi.org/10.1080/09644008.2015.1116522

Kiousis, S. (2002). Interactivity: A concept explication. *New Media & Society*, *4*(3), 355–383. https://doi.org/10.1177/146144402320564392

Kreiss, D. (2014). Seizing the moment: The presidential campaigns' use of Twitter during the 2012 electoral cycle. *New Media & Society*, *18*(8), 1473–1490. https://doi.org/10.1177/1461444814562445

Kwak, H., Lee, C., Park, H., & Moon, S. M. (2010). What is Twitter, a social network or a news media? In *Proceedings of the 19th International Conference on World Wide Web* (pp. 591–600). Association for Computing Machinery. https://doi.org/10.1145/1772690.1772751

Lee, E., & Shin, S. Y. (2012). Are they talking to me? Cognitive and affective effects of interactivity in politicians Twitter mommunication. *Cyberpsychology, Behaviour, and Social Networking*, *15*(10), 515–520. https://doi.org/10.1089/cyber.2012.0228

Lee, N. Y., Kim, Y., & Kim, J. (2016). Tweeting public affairs or personal affairs? Journalists' tweets, interactivity, and ideology. *Journalism*, *17*(7), 845–864. https://doi.org/10.1177/1464884915585954

Lewis, S., Holton, A., & Coddington, M. (2014). Reciprocal journalism: A concept of mutual exchange between journalists and audiences. *Journalism Practice*, *8*(2), 229–241. https://doi.org/10.1080/17512786.2013.859840

López-García, G. (2016). 'New' vs 'old' leaderships: The campaign of Spanish general elections 2015 on Twitter. *Communication & Society*, *29*(3), 149–168. https://doi.org/10.15581/003.29.3.149-168

López-Meri, A., Marcos-García, S., & Casero-Ripollés, A. (2017). What do politicians do on Twitter? Functions and communication strategies in the Spanish electoral campaign of 2016. *El Profissional de la Información*, *26*(5), 795–804. https://doi.org/10.3145/epi.2017.sep.02

López-Rabadán, P., & Mellado, C. (2019). Twitter as a space for interaction in political journalism. Dynamics, consequences and proposal of interactivity scale for social media. *Communication & Society*, *32*(1), 1–18. https://doi.org/10.15581/003.32.1.1-18

Maarek, P. J. (2011). *Campaign communication and political marketing*. Wiley-Blackwell.

McNair, B. (2017). *An introduction to political communication* (6nd ed.). Routledge.

Meraz, S., & Papacharissi, Z. (2013) Networked gatekeeping and networked framing on #Egypt. *The International Journal of Press/Politics*, *18*(2), 138–166. https://doi.org/10.1177/1940161212474472

Moinuddin, S. (2019). *The political Twittersphere in India*. Springer.

Morris, D. S., & Morris, J. S. (2017). Evolving learning: The changing effect of Internet access on political knowledge and engagement (1998–2012). *Sociological Forum*, *32*(2), 339–358. https://doi.org/10.1111/socf.12333

Murthy, D. (2012). Towards a sociological understanding of social media: Theorizing Twitter. *Sociology*, *46*(6), 1059–1073. https://doi.org/10.1177/0038038511422553

Norris, P. (2000). *A virtuous circle: Political communications in post-industrial societies*. Cambridge University Press.

Parmelee, J. H., & Bichard, S. L. (2012). *Politics and the Twitter revolution: How tweets influence the relationship between political leaders and the public*. Lexington Books.

PCP acusa Rio de querer "dar ordens à PJ" sobre "quem pode ou não" ser detido. (2021, December 16). SIC Notícias. https://sicnoticias.pt/pais/2021-12-16-PCP-acusa-Rio-de-querer-dar-ordens-a-PJ-sobre-quem-pode-ou-nao-ser-detido-8240c859

Pfetsch, B., & Esser, F. (2012). Comparing political communication. In F. Esser & T. Hanitzsch (Eds.), *Handbook of comparative communication research* (pp. 25–47). Routledge.

Rafaeli, S., & Sudweeks, F. (1997). Networked interactivity. *Journal of Computer Mediated Communication*, *2*(4), Artigo JCMC243. https://doi.org/10.1111/j.1083-6101.1997.tb00201.x

Ramos-Serrano, M., Gómez, J. D. F., & Pineda, A. (2016). 'Follow the closing of the campaign on streaming': The use of Twitter by Spanish political parties during the 2014 European elections. *New Media & Society*, *20*(1) 122–140. https://doi.org/10.1177/1461444816660730

RTP Play. (2021, December 14). *Eleições legislativas 2022 - Entrevistas líderes partidários: PSD - Rui Rio|Ep. 7* [Video]. https://www.rtp.pt/play/p9596/e585997/eleicoes-legislativas-2022-entrevistas-lideres-partidarios

Rui Rio sugere que calendário eleitoral influenciou prisão de Rendeiro. (2021, December 12). Rádio Renascença. https://rr.sapo.pt/noticia/pais/2021/12/12/rui-rio-sugere-que-calendario-eleitoral-influenciou-prisao-de-rendeiro/264247/

Stieglitz, S., & Dang-Xuan, L. (2014). Social media and political communication - A social media analytics framework. *Social Network Analysis and Mining*, *3*(4), 1277–1291. https://doi.org/10.1007/s13278-012-0079-3

Stromer-Galley, J. (2014). *Presidential campaigning in the internet age*. Oxford University Press.

Swanson, D. L., & Mancini, P (1996). *Politics, media, and modern democracy*. Praeger.

Van Aelst, P., Sheafer, T., Hubé, N., & Papathanassopoulos, S. (2017). Personalization. In C. de Vreese, F. Esser, & D. N. Hopmann (Eds.), *Comparing political journalism* (pp. 112–130). Routledge.

Zamora-Medina, R., Sánchez-Cobarro, P. H., & Martínez-Martínez, H. (2017). The importance of the "strategic game" to frame the political discourse in Twitter during 2015 Spanish regional elections. *Communication & Society*, *30*(3), 229–253. https://doi.org/10.15581/003.30.3.229-253

Biographical Note

Vítor Gonçalves is a PhD candidate in communication sciences at Instituto Universitário de Lisboa. He holds a master's degree in political science (Instituto Superior de Ciências Sociais e Políticas, 2002–2004) and has a degree in social communication (1988–1992). He completed a journalism course at the Boston University College of Communication (United States of America) in 1998 and a television journalism course at the RTP Training Centre in 1992. He is a journalist at RTP, host of the *Grande Entrevista*

(Great Interview), and deputy director of information in 2011–2012 and 2015–2018. He was Washington correspondent (2007–2011) and national politics editor (2000–2007). He has lectured at the Instituto Superior de Comunicação Empresarial (2011–2018) and the Instituto Superior de Ciências Sociais e Políticas (1997–2007 and 2012 to date). He is also the author of several publications.

ORCID: https://orcid.org/0000-0002-0342-4357

Email: vitgonlou@gmail.com

Address: Iscte – Instituto Universitário de Lisboa, Avenida das Forças Armadas, 1649-026

Submitted: 13/05/2023 | Accepted: 14/08/2023

Comunicação e Sociedade, vol. 44, 2023, e023027
https://doi.org/10.17231/comsoc.44(2023).4744

The Erosion of Proximity: Issues and Challenges for Local Journalism in Contemporary Society

Dora Mota
Centro de Estudos de Comunicação e Sociedade, Instituto de Ciências Sociais, Universidade do Minho, Braga, Portugal

Abstract

The decline of local journalism, which has lost resources and influence, is reflected in phenomena such as "news deserts" that are increasingly prevalent worldwide. A recent study suggests that over half of the municipalities lack local news coverage in Portugal. This article proposes an analysis and reflection on the issues and challenges currently affecting local journalism, drawing on a review of recent literature. It is presented as the weakest link in the global media crisis, grappling with traditional business bankruptcies and platform competition. However, it is also uniquely adaptable to endure in an adverse context. The closure of local media, the struggle for survival among the remaining outlets, and the reluctance of journalists to involve audiences in defining news contribute to the erosion of proximity, albeit with some positive signs. Among these signs is a widespread acknowledgement of the significance of local journalism and a growing academic interest in this domain.

Keywords
proximity, audience, local journalism, news deserts, platforms

A Erosão da Proximidade: Questões e Desafios do Jornalismo Local na Sociedade Contemporânea

Resumo

O enfraquecimento do jornalismo local, que tem perdido meios e influência, é traduzido por fenómenos como os "desertos de notícias", em mapeamento num número crescente de países. Em Portugal, um estudo recente aponta para que mais de metade dos municípios se encontrem carentes de cobertura noticiosa sedeada no território. Este artigo propõe um balanço e uma reflexão em torno das questões e desafios que enfrenta atualmente o jornalismo local, a partir da revisão da literatura recente. É apresentado como o elo mais fraco na crise global dos média, sendo o mais afetado pela falência do negócio tradicional e pela concorrência das plataformas. Contudo, é-lhe também reconhecida uma flexibilidade singular para singrar num contexto de adversidade. O encerramento de meios locais, a difícil sobrevivência dos que ficam e a resistência dos jornalistas em deixar os públicos serem parceiros na definição do que é notícia são alguns dos fatores a contribuir para um momento de erosão da proximidade, com alguns sinais positivos. Entre esses sinais, está o consenso em torno da importância do jornalismo local e um crescente interesse da academia por este campo de estudos.

Palavras-chave
proximidade, audiência, jornalismo local, desertos de notícias, plataformas

1. Introduction

In an era marked by the emergence of "news deserts", several circumstances contribute to the crisis in local journalism. Firstly, the traditional journalism business's bankruptcy, unable to keep pace with the new demands of the digital environment and overshadowed by unbeatable platform competition — akin to an unmatched Goliath in this power dynamic. Additionally, the audience's emancipation plays a pivotal role; they have changed their position on the board of this power game, transitioning from passive recipients to active content creators and distributors — and a key element in the "attention business".

In this context, local journalism grapples with several challenges, notably in establishing a fitting business model while upholding its essence of proximity. There is also the pressing need to navigate the evolving relationship with an audience increasingly involved in shaping and influencing the news. The current issues and challenges — marked by the decline of local media in the territories and the consequent eroding impact of local journalism — have been noted in the literature, particularly in the past 15 years. Academia's growing interest in local journalism in recent years indicates its emergence as an exciting field of study — with its own issues and challenges to unravel.

This article highlights the main conclusions of the latest academic literature on the universe of local journalism, encouraging reflection on less explored factors. It delves into the role of journalists in this erosion of proximity, as certain studies suggest that merely being present in the territory does not ensure genuine closeness to the audience. Professional culture and journalists' perceptions regarding their social legitimacy and responsibilities also influence this dynamic. As Jerónimo et al. (2020) emphasise, there is a crucial need to question whether we are "close enough".

2. The Issues

2.1. Businesses in Tatters Amid Platform Competition

"Crisis", "disruption", "pressure", and "decline" are words often used to describe the current state of journalism and, in particular, local journalism. It is widely agreed that the shift to digital has disrupted the traditional media business, compounded by the 2008 economic crisis and the dominance of digital platforms as formidable competitors in the advertising sphere. The profound impact of the COVID-19 pandemic since late 2019 has further intensified these challenges (Harris, 2021; Newman, 2022; Schulz, 2021).

It is also generally agreed that local and regional media have been the weakest link in this global crisis, as audiences and advertising revenue have shifted to the big platforms, with many titles (some historic) shutting down and others cutting back on resources (Schulz, 2021). According to Schulz (2021), "local newspapers in particular have been hit hard by disruption to both consumer behaviour and business models, and the pandemic has only increased pressures" (p. 42). The *Reuters Institute Digital News Report*

2022 signalled the strengthening influence of digital platforms in an "incredibly competitive marketplace for attention" (Nielsen, 2022, p. 5). In the Foreword to this report, Nielsen (2022) states that

> most news media continue to struggle in an unforgiving winner-takes-most online environment, where the bulk of audience attention and advertising spending goes to digital platforms, and where many new voices – ranging from creators and influencers to activists and politicians – are carving out their own place, competing head-on with journalists for attention. (p. 5)

Current trends include "a weakening of the connection between journalism and much of the public, and younger people using media in ways that challenge inherited approaches to the business and practice of journalism" (Nielsen, 2022, p. 5) — which translates to a preference for platforms as the primary source for accessing news and information overall. Higher levels of distrust and voluntary disengagement from news were among the main trends identified. Within the 46 countries studied, only seven did not see a drop in trust towards traditional media, and in most of them, citizens are still unwilling to pay to read news. When they subscribe to news, a large proportion of digital subscriptions go to just a few big national brands (Newman, 2022, pp. 10–11).

For Sjøvaag and Owren (2021), local journalism has suffered particularly acutely from the failure of its "umbrella" market model — which guaranteed it a share of the advertising market from advertisers looking for local targets. The introduction of algorithmic and programmatic processes in advertising was a major blow to the sector. According to the authors, local newspapers have proved to be "more vulnerable" than national newspapers since the latter have the corporate capacity to conquer new markets. A report by the International Press Institute (Park, 2021) emphasises this unequal competition:

> the disruption has been particularly acute in local media as the advertising opportunities presented by the big platforms' algorithmic micro-targeting most directly replicate the traditional offering of local media (think Google's powerful "near me" offering). Large, often national, advertisers also prefer to place at scale, bypassing the much smaller (particularly *start-up*) local players. (p. 35)

Recently, the Australian government kicked off what could be "a global turn towards platform regulation" (Bossio et al., 2022, p. 136) by implementing a law that obliges large digital platforms to negotiate with local media for the right to share their news. The enactment of the "Australian News Media and Digital Platforms Mandatory Bargaining Code" made Facebook retaliate by blocking several Australian news companies' ability to share for a few days. The regulation of platforms is an ongoing heated debate.

2.2. The News Deserts

The significant and accentuated closure of local newspapers over the last 15 years has been coined with a striking name in the United States: "news deserts". Since then, this closure of local newspapers to the point of leaving communities, and even entire regions, devoid of any traditional media representation has been mapped in other countries. The project led by Penelope Abernathy — *The Expanding News Deserts*[1] — initiated data collection in 2005. It highlights the closure of local newspapers, journalist unemployment, ownership concentration, and the rise of new media primarily aligned with (political or social) causes as contributors to these news deserts. Among the surviving newspapers — even prestigious ones such as Pulitzer Prize winners and historically significant titles — many have become "mere 'ghosts,' or shells of their former selves" (Abernathy, 2020, p. 5).

The vanishing of local newspapers and journalists, leaving behind a landscape of survivors and ghosts, paints the picture of news deserts: "a community, either rural or urban, where residents have very limited access to the sort of credible and comprehensive news and information that feed democracy at the grassroots level" (Abernathy, 2020, p. 18). The current era has starkly highlighted this phenomenon. The pandemic

> has exposed the deep fissures that have stealthily undermined the health of local journalism in recent years, while also reminding us of how important timely and credible local news and information are to our health and that of our community. (Abernathy, 2020, p. 5)

Ferrier et al. (2016) highlighted a concern in the United States: acknowledging newspapers' role in "[meeting] critical news and information needs" might pose a risk to democracy. Engaged in another monitoring endeavour — the *Media Deserts Project*[2] — these authors favour the definition of "media deserts", considering it multidimensional and more likely to incorporate various layers of analysis, such as access and algorithms.

The phenomenon has also been mapped in Brazil since 2017 through the *Atlas da Notícia* project (https://www.atlas.jor.br; Silva & Pimenta, 2020). Their latest report indicates that 52% of Brazilian municipalities, encompassing approximately 29,000,000 people, are classified as news deserts. Most of these "deserts" are located in the northern region of the country, where there has also been an emergence of numerous new online news outlets (Belda & Pimenta, 2022).

The *Local News Research Project* (https://localnewsresearchproject.ca) in Canada has been active since 2008, combining content analysis and digital mapping to explore issues related to local news. Meanwhile, in another latitude, the *Australian Newsroom Mapping Project* (https://anmp.piji.com.au) is associated with the Public Interest Journalism Initiative, an independent, non-profit observatory. It presents the data on an interactive map delineating Australia's news deserts, highlighting a 15% decline in local newspapers between 2008 and 2018. This decline has left dozens of territories without a single local news outlet (Australian Competition and Consumer Commission, 2019).

[1] This initiative is part of the Center for Innovation and Sustainability in Local Media, housed within the Hussman School of Journalism and Media at the University of North Carolina at Chapel Hill in the United States. Its website is https://www.usnewsdeserts.com.

[2] The *Media Deserts Project* is a joint research project of the E.W. Scripps School of Journalism, the Department of Geography and the Voinovich School of Leadership and Public Affairs at Ohio University in the United States. You can explore further details at https://www.mediadeserts.wordpress.com.

In Portugal, efforts are underway to map news deserts, with an initial contribution from the study by Jerónimo et al. (2020). This study updated the last comprehensive sector overview published by the Regulatory Authority for the Media (ERC) in 2010 (Martins & Gonçalves, 2010). Jerónimo et al. (2020) highlighted a "significant decrease in local media landscape, especially since 2004" (p. 814).

This trend placed Portugal in the widespread crisis of local journalism, even though Portugal continues to show "a certain vitality of the local media" and is portrayed as "a paradigmatic case in the European context", as highlighted by the authors (Jerónimo et al., 2020, p. 814). Many of them, however, were characterised by small, financially precarious newsrooms with low remuneration, upholding their commitment to "journalism that is faithful to traditional values and seeks to meet the needs of the community" (p. 814).

In the initial attempt to chart Portugal's news deserts, Ramos (2021) identified 18.5% of municipalities facing this predicament — the vast majority located in territories with low population density and *per capita* income, primarily within the country's interior. The study was further developed the following year through a database built by the authors, built upon the most up-to-date ERC records and after the list had been cleared, and a thorough verification of media activity in each region was conducted (Jerónimo et al., 2022). Their findings indicate that over half of Portugal's municipalities are currently news deserts or are at risk of becoming one (Figure 1).

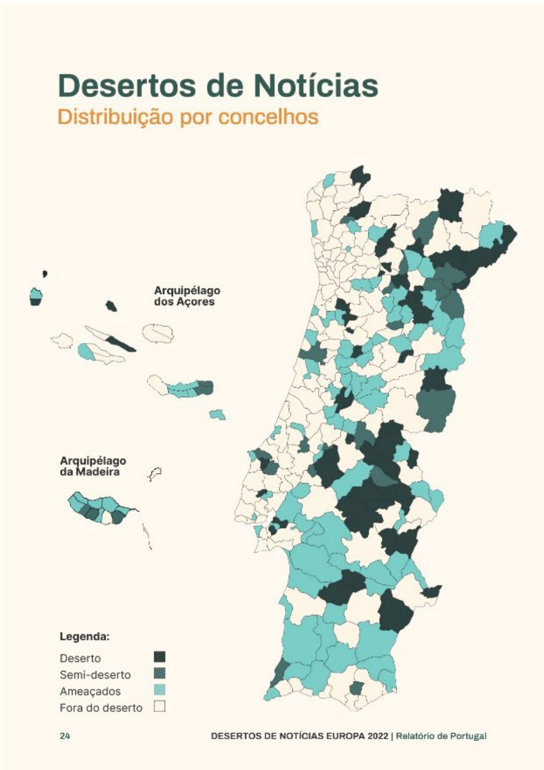

Figure 1. *Map of news deserts in Portugal*

Source. From "Mapas dos Desertos de Notícias: Portugal", by P. Jerónimo, G. Ramos, & L. Torre, 2022, from *Desertos de Notícias Europa 2022: Relatório de Portugal*, p. 24. Copyright 2022 by Pedro Jerónino, Giovanni Ramos, Luísa Torre and Daniel Baldaia.

The authors highlight that out of the country's 308 municipalities, 166 (53.9%) are currently identified as desert, semi-desert, or facing imminent threats of news scarcity. Moreover, a quarter of the municipalities (25.3%) "lack satisfactory or regular news coverage altogether" (Jerónimo et al., 2022, p. 20). Notably, 59% of Portuguese municipalities do not have printed newspapers. Furthermore, consistent with Ramos's initial study (2021), the phenomenon is predominantly internalised within the country — 80% of these news deserts and semi-deserts are concentrated in inland municipalities across the North, Centre, and Alentejo regions.

The correlation between news deserts and low population density is further underscored (58% of the least inhabited municipalities face this situation), with some demographic data advanced in the *MediaTrust* project report.

> Over 13.4% of the country's citizens reside in news deserts or communities at risk of becoming news deserts. That is 1,390,493 people living in the 78 counties with insufficient regular news coverage or in the 88 counties relying on just one media outlet for more frequent local news coverage. (Jerónimo et al., 2022, p. 21)

In a study that advocates for integrating additional dimensions and approaches in the inherently intricate research surrounding news deserts, Agnes Gulyas (2022) found that 10% of the most deprived areas in the UK are also those less served with local news media. In this pioneering study of British news deserts, the author argues that "researching spatial inequalities should go beyond just recognising variations between different localities and aim to identify how and why spatial context contributes to inequality and links to existing socio-economic inequalities" (Gulyas, 2022, p. 25).

2.3. Actual and Perceived Proximity

Exploring one of the United States' "news deserts", Mathews (2020) analysed the impact of the closure of a local newspaper that had been in operation for 99 years. As the article's author suggests, the findings indicate "a negative impact on community members' sense of community, with participants missing celebrated gatherings and noting increased isolation and diminished pride in their community" (p. 1250). Binns and Arnold (2020) refer to another consequence in their study examining the closure of local newspapers in the UK and the dwindling number of journalists in those still operational: the lack of coverage of criminal cases, which leads to reduced scrutiny of police action and investigation.

Still in Europe, specifically in Sweden, a study by M. Karlsson and H. Rowe (2019) underscores the risk of exclusion certain territories face. The authors found that news about communities without local newspapers was dominated by institutional actors and mainly reported on crime — a sign that news organisations wanted to do the same job from a distance and with fewer resources.

> The absence of an editorial office seems to result in a dilution effect, producing news stories that are feasible in several news outlets (and possibly municipalities). Or, put differently, the absence of an editorial office in a municipality seems to result in less news aimed specifically at that municipality. (Karlsson & Rowe, 2019, p. 22)

It should also be noted that the author's (Karlsson & Rowe, 2019) findings suggest a nuanced understanding of "presence" in proximity journalism. They emphasise that "presence" should denote permanence: "presence is not understood as simply being on the scene occasionally or when something dramatic happens, but a presence that has longevity in order for journalists to become familiar with the people, the community and their issues" (p. 16).

However, mere presence might not necessarily translate to increased engagement with the community, according to Jacob L. Nelson (2021). In a study examining how two Chicago newspapers in the United States sought to get closer to their audiences, the author outlined how the different strategies were primarily rooted in audience perception. One team endeavoured to present their stories appealingly, leveraging audience metrics; the other prioritised integrating everyday life issues, particularly from under-represented communities, into their news coverage.

The author points out that the former journalism's "problem is one of distribution" while for the latter, "it's representation" (Nelson, 2021, p. 13). Nelson (2021) suggests taking into account, when considering proximity, what he believes to be "one of the most important – yet least studied – aspects of journalism: the connection between how journalists perceive and pursue their audiences" (p. 18).

The rise of an engaged public actively involved in content creation and dissemination, marking the digital era's revolution, appears to clash with journalism's reluctance to embrace challenges to its traditional model. This resistance to change has been apparent since as far back as 2006 when journalism professor Jay Rosen (2006) penned the renowned essay "The People Formerly Known as the Audience" on his blog *PressThink – Ghost of Democracy in the Media Machine* (https://pressthink.org). In May 2021, Rosen, whose advocacy of citizen journalism is famous, declared on the social network Twitter that the prestigious Pulitzer Prize for journalism "would be smart to create a special category where the people formerly known as the audience can be recognised for committing journalism". Less than a month later, he rejoiced when American teenager Daniela Frazier received a special citation in these awards (Fu, 2021) for filming and posting on social media the death of George Floyd at the hands of a police officer (who was later convicted of murder) in May 2020. The video triggered protests against police violence and racism — sparking a broader debate about whether citizens engaging in such actions could be considered "acts of journalism" (Fidalgo, 2021).

Social media has propelled the evolution of news delivery into a new paradigm — the "unbundling of news" (Jurno & D'Andréa, 2020; Newman et al., 2021). "The journalistic product of a newspaper, provided in the form of an organised bundle to the audience, is transformed into many isolated pieces of content offered in a personalised way to spread users" point out Jurno and D'Andréa (2020, p. 508).

For local journalism, this has meant losing importance as the main source of information in its region of influence. According to the *Reuters Institute Digital News Report 2021* (Newman et al., 2021), when it comes to local media, social media and direct search take the biggest shares for information about shops and restaurants (49%), local services (47%), or things to do in the area (46%). Although these searches direct the public to local media content, "in many cases, the information being sought is contained within the platform, making them a destination in their own right" (Schulz, 2021, p. 45).

In an analysis of Facebook's actions since 2017, as part of the *Facebook Journalism Project* with local journalism (focusing on partnerships, funding projects and training journalists), Jurno and D'Andréa (2020) consider that we can now speak of a "platformisation of journalism". The gradual penetration of platform logic into the journalistic process has "strongly normative and prescriptive dimensions" that "appropriates and tightens the values and practices" (p. 519).

3. The Challenges

3.1. The New Players in the News Field

Given the growing attention and diverse perspectives on the relationship between journalism and its audiences, Jay Rosen's expression seems to remain relevant. Vos et al. (2018) discuss a permanent negotiation of journalism's social legitimacy. As the audience is the judge of journalism's social legitimacy but also as the basis of the "attention market", "journalists have found themselves in a complex relationship with news audiences" (Vos et al., 2018, p. 1009) — which becomes even more complex the more empowered the audience becomes to interfere in the digital environment. Journalists, who were once the "sole guardians of journalistic capital" (Vos et al., 2018, p. 1009), face citizens as new players.

Critical functions like the *watchdog* and *gatekeeper* roles are at stake. Journalists are faced with the ongoing task of negotiating their legitimacy (Vos et al., 2018), realising that the local public tends to hold a more critical perception of journalism than those within the profession. This public did not strongly endorse traditional journalism norms such as *watchdog* and rapid reporting. Instead, it perceived such roles as providing a community forum as more important. Vos et al. (2018) conclude that if journalists paid more attention to the public in news production, "a more active and interventionist journalism could result" (p. 1024), leaving a call for more research into "the misalignment between journalists and the public's views of journalistic role" and into the mechanisms by which the public influences journalism (p. 1024).

Harcup and O'Neill (2017) revisited their taxonomy of news values, initially presented in 2001 — a reference in journalism studies — drawing on the review of John Galtung and Mari Ruge's seminal study[3]. The advent of social media has significantly impacted the revised array of news values, introducing a notable addition: shareability.

> There may be little doubt that digital media can help challenge mainstream news agendas, but the most popular stories do not reflect this democratic ideal. Rather, the most common news value is entertainment; such stories seem to be shared by online readers because they are fun, and sharing them can brighten the day. (Harcup & O'Neill, 2017, p. 1480)

However, these authors suggest that this revisitation should be seen as a tool for analysis and further research since other factors are involved in journalists' choice of subjects that become news. This is because, they point out, "who is selecting news, for whom, in what medium and by what means (and available resources), may well be as important as whatever news values may or may not be inherent in any potential story" (Harcup & O'Neill, 2017, p. 1483) — and that's why when you ask a journalist why something is news and he answers "it just is!", "there will always remain an element of truth to the reply" (p. 1483), they emphasise.

For Jacob L. Nelson (2021), these "gut instincts" today, combined with audience metrics, lead journalists to decide what they think the public wants. However, for this author, journalists have always been chasing an "imagined audience", and the stories they tell "are moulded and constrained by the assumptions they form about the people they hope to reach. Have grown even more important in recent years" (p. 2). "As the news industry attempts to overcome its ongoing crisis of diminishing revenue and public trust, its focus has increasingly shifted toward embracing a public it was once all too happy to largely ignore" (Nelson, 2021, p. 2).

The panorama has changed with the need to captivate audience loyalty in an "emerging consensus" that brings together journalists, media managers, investors and researchers, and whose implementation (and theorising) has been given various names, such as "engaged", "participatory", "reciprocal" or "public-powered" journalism — with the terminology effort signalling that "all of which trace the profession's [journalism] problems to the notion that audiences are no longer willing to tolerate a one-sided relationship with the power dynamic is skewed and their input or rarely solicited or valued" (Nelson, 2021, p. 3).

Nelson (2021) argues, taking on a "counter-narrative" (p. 5), that journalists should accept, with "journalistic humility" (p. 6), that they will never be able to fully understand or control their audiences, at the end of the day, these attempts to engage with them may function more as "a means to improve journalism than a means to increase readership" (p. 6). Despite this shift towards the audience, the author notes that "there is no

[3] Galtung and Ruge's study, entitled "The Structure of Foreign News", was published in the *Journal of International Peace Research* in 1965 (Harcup & O'Neill, 2001, p. 261).

consistent conceptualisation of the news audience" (Nelson, 2021, p. 144), even with the increasingly sophisticated data collection methods. He highlights that journalists have always relied on "intuition and gut instincts" (Nelson, 2021, p. 145) to determine who they are and what they want from the news.

3.2. Questioning the Application of Proximity

At this point, there is a question about whether the same applies to local journalism, traditionally driven by proximity. A study by Jerónimo et al. (2020) delves into what Érik Neveu (2001/2005) identifies as a peril of professional mythology, emphasising how journalists often formulate theories about their own practices.

> The practice of an imagined proximity journalism is sometimes far from reality. Local journalists are not always as available or as close to the community as they claim. When this happens, it is more to feed the journalistic needs (make news) than to seek a permanent dialogue. (Jerónimo et al., 2020, pp. 818–819)

The literature underscores the widespread stance among local journalists in various countries, asserting their authority status within their communities. Jerónimo et al. (2020) cross-referenced local journalists' perceptions of proximity with how they leverage the digital environment to exercise it. While the study noted some under-utilisation of the digital environment in production routines, it highlighted the extensive integration of Facebook and Twitter in the day-to-day practices of local journalists. The study conducted primarily in the Centre region (where most regional and local media in Portugal are concentrated) concludes that digital tools are predominantly employed for gathering information rather than fostering citizen engagement. Additionally, it identifies a division in journalists' stances on this matter. The authors claim that "not everyone seems willing to establish a permanent dialogue with citizens, mediated technologically" (Jerónimo et al., 2020, p. 823).

Boesman et al. (2021) sought to test the "participatory journalism" ideal, which they believe dominates contemporary journalism practice and study. They observed discrepancies and conflicting outcomes in the literature while assessing whether journalists and the public express different conceptions of what constitutes news. Building on the methods adopted in previous studies like Harcup and O'Neill (2017) and drawing from their own research that indicated limited audience participation in the initial stages of the news process, the authors set out to examine whether the audience's perception of news values clashed with those of journalists.

The decision to focus on the initial phase of news production (selection and framing) is attributed to this phase being when journalists tend to put up the most barriers to safeguard their professional authority and control over determining what qualifies as news. The previous findings "do not necessarily mean that journalists do not see value in audiences as idea generators and/or as sources, but they are unsure about how to organise and monitor user contributions exactly" (Boesman et al., 2021, p. 144). These conclusions, drawn from research conducted in the Netherlands, align with the outcomes of the Portuguese study.

Boesman et al. (2021) chose to analyse the practices of local journalists in their interaction with their audience because these journalists position themselves as "community members first and journalists second" (p. 146). They aimed to understand whether these journalists are in any way challenged by news values suggested by the audience. Across three newsrooms analysed in their study, the audience posed challenges to the journalists, urging them to reconsider what constitutes recent news (excluding urgent matters), "forget the power elite" (prominence), advocating for a move from conflict-centric reporting to a more constructivist approach (making the news more solutions-orientated), and emphasising a focus on narratives intertwined with the community's history and essence.

In short, journalists were challenged on traditionally non-negotiable news values: recency, novelty and relevance, and their independence since incorporating the participatory ideal into news production entails the potential of dealing with disgruntled citizens pursuing personal agendas or seeking free publicity. Boesman et al. (2021) underscore the significance of comprehending the public's perspective on newsworthiness more deeply. "Instead of considering audience suggestions as a binary matter of newsworthiness (or not), journalists would do more justice to participating audiences by looking at how they can make audience input newsworthy" (Boesman et al., 2021, p. 159).

Making the audience's contribution newsworthy was one of the common trends among 30 local media projects described in a report by the International Press Institute (Park, 2021), highlighting the resurgence of local news projects across various countries worldwide. "Successful local media have a clear sense of their mission, editorial vision and audience (or potential audience). This confidence is guiding a reimagining of journalism to meet the needs of their community" (Park, 2021, p. 4). These diverse local media strategies, spanning different continents, share a commitment to reflecting and shaping the community. They demonstrate an awareness of cultural complexity and diversity while "looking like the community" (Park, 2021, p. 4).

On the other hand, these projects are characterised by "engagement of local communities (...) embedded across the process chain" with a sense of equity and inclusion (and even the creation of literacy and training for citizen journalists), "journalism of service" and an effort to understand and make events relevant to local audiences. "There is no right or wrong model – nor one single best product. Local news media are finding ways to reach their audience where they are" the report reads (Park, 2021, p. 6).

Recent research conducted by Jenkins and Nielsen (2019, 2020) underscores the unique adaptability of local newspapers in meeting this challenge, although constrained by the technological and generational transition. The authors emphasise the quest for novel strategies ensuring the financial sustainability of these ventures, which encompasses editorial aspects, noting the coexistence of so-called quality and popular journalism approaches. The commitment to upholding traditional values (historical presence, professional values and readers' trust) and emphasising proximity and public service remain steadfast as they endeavour to win over online audiences. This phenomenon leads the authors to label local newspapers as "ambidextrous organisations" (Jenkins & Nielsen, 2020, p. 485).

3.3. The "Return to the Local" in Research

The crisis confronting local media, epitomised by concepts like news deserts, has fuelled heightened scholarly interest in this sector, characterised by Jerónimo and Correia (2020) as a "return to the local" within journalism studies.

> Following a period dominated by discussions on globalisation, propelled by technological advancements and chiefly the advent of the Internet, there appears to be a shift in focus toward advocating for a return to the local. At the heart of this return lies an acknowledgement of the significance of (re)visiting territories and communities and (re)discovering their identities. (Jerónimo & Correia, 2020, p. 11)

Recent literature acknowledges the contribution of local media in fostering social cohesion, shaping identity, and facilitating democratic enlightenment of the community and proximity news production... despite all their flaws, which many studies have also identified. "There is compelling evidence that local journalism, despite its shortcomings, is actually often informative and helps people follow local public affairs" (Nielsen, 2015, p. 18). The author highlights research findings that suggest that local journalism "helps generate higher levels of civic and political engagement" and also "contributes to community integration, represents communities, and helps tie people together" (Nielsen, 2015, p. 18). For Brian McNair (2006),

> if news is our window on the world, local news is our window on that part of the world we actually inhabit (...), tells us what's happening in our own streets and backyards. Parochial by definition, local journalism is part of the social cement which binds communities together and is widely and rightly viewed as an essential element in the construction of local identity. (p. 37)

Around the same time, Aldridge (2007) emphasised the pivotal position:

> local media may lack glamour, but their importance is beyond doubt. The community of residence is, as Friedland so vividly expresses it in Habermasian terms, the 'seam' between the system and the lifeworld (2001:374). Here institutional structures and processes become daily reality. For most people,

> most of the time, everyday needs are met and regular routines played out within familiar territory. (p. 161)

Several years and major changes later, this perspective endures. Jenkins and Nielsen (2019) refer to local media as a "cornerstone" within communities. Carlos Camponez (2011) delves into the symbolic dimension of this journalism as a "communicational pact forged within place-based communities – that is, communities identifying themselves through values and interests cultivated and perpetuated locally, stemming from experiences entrenched in specific territories" (p. 36).

Nielsen (2015) brings forth a nuanced perspective, stating that "journalists and journalism scholars alike are and have been ambivalent about the quality of local journalism" (p. 1). It is a sector with "terrible" shortcomings — and he underscores, for example, the prevalence of deferential attitudes towards local powers and figures, or even advertisers. We would also draw on the contribution of Ross (2006), who delves into how the local media reproduced the same "circuit of meaning" as the national media, privileging an elite white male voice and perspective even though the local press "has much more freedom to promote more diverse views because it is not tied to a national agenda" (p. 232).

We can also refer to local journalism's tendency to produce "soft news stories" and promote "rural idyll representations" as one of these controversial effects of community proximity (Freeman, 2020, pp. 14–15). This inclination towards preserving the image of the community sometimes overriding adherence to traditional journalistic news values (such as conflict and controversy) should be analysed in the light of the specificity of local journalism — the case involving a local newspaper that took a "moral compass" position in its news coverage of a fractious issue rather than "normative ideas about the role of journalism", reported by Hess and Waller (2020, p. 586).

Leupold et al. (2018) concluded in a study of local newspapers in Germany that local journalism is characterised by "a docile and uncritical style of reporting that emphasises the positive aspects of local civil society actors and community life" (p. 4), confirming other previous studies that reported "a lack of conflictive, critical, and investigative journalism" (p. 4). The local media preferred to prioritise news linked to social cohesion, such as networking, trust in institutions, identification, and respect for social norms.

Revisiting Nielsen's (2015) reasoning on ambivalence, the literature suggests that, despite its "terrible shortcomings", local journalism is also seen as "terribly important" as it is a forum for debate and a hub for the community.

> The reality of local journalism probably lies not between these two extremes, but in their combination. Like journalism more broadly, local journalism may well be frequently terrible and yet also terribly important. Local journalism does not always play its roles well, but the roles it plays are important. (Nielsen, 2015, p. 1)

Michael Schudson (2019) proposes a reconciliation, saying there is no divergence between the acceleration of society and the permanence, or slower change, of certain values. He contends that the world consists of juxtaposed layers moving at varying speeds.

> Though we live culturally more and more online, we also live as we always did, embodied, and in one place at a time. We carry devices through which we are in touch with a wider world, but we are in touch from our own homes, neighbourhoods, workplaces, worrying about our own families and friends and love lives, and whether there's enough milk in the fridge for tomorrow's breakfast. (Shudson, 2019, p. 79)

For this reason, even though there is "plenty of reason for concern about a rapidly shifting context for journalism", "we should give this full consideration in relation to journalism's impressive continuities" (Schudson, 2019, p. 79).

Guimerà et al. (2018) had already stated that this was a "vibrant line of research" (p. 6) with four main ramifications: the impact of transformations in the local media sector on the lives of communities, the economic crisis of local media and the emergence of hyperlocal media, participation, and content produced by the public, and changes in local journalistic culture. Among the gaps to be filled in the field, the authors identified the need to theorise and better delimit "an object of study which is by definition heterogeneous and highly dynamic" (p. 7) and to deepen knowledge about the origins of changes in the sector, observing the evolution of news projects over several decades — and not just since the advent of digital journalism. The authors also suggest strengthening the audience's perspective for "a deeper reflection on the redistribution of legitimacies in local news production and the position of media professionals in an ecosystem filled with new voices that do not always get to be heard" (Guimerà et al., 2018, p. 8).

Gulyas and Baines (2020) also call for

> greater awareness of historical connections. Local media have a long history, and yet our understanding of the historical development of the sector, its continuities and discontinuities, and how histories and their legacies shape contemporary structures and realities is arguably limited. (p. 17)

These authors (Gulyas & Baines, 2020) reinforce Guimerà et al.'s (2018) call for a deeper understanding of the reality in countries other than those where most research in this field is concentrated to expand the landscape and the potential for comparative studies.

Gulyas and Baines (2020) confirmed the growing interest in this line of research by searching the Web of Science Core Collection database, which revealed that around 70% of publications on journalism, media and local news for the period between 1977 and 2019 appeared in the last ten years — and about half of them in the last five. The authors point out the "significant geographical variations between the countries covered" (Gulyas & Baines, 2020, p. 1), with around 40% of publications about the United States, 8.5% about the United Kingdom, 7.5% about Australia and 5% about Canada. A further 60 countries share the remaining 38% of academic interest.

The same authors stress the importance of revisiting and refining, deepening and clarifying new and classic terminologies and concepts such as "local", "local journalism", and "community", given recent studies that "suggest that a transformation is taking place in the manner in which communities are perceived in the field – less as object, more as process and practice, as action, activity, purpose" (Gulyas & Baines, 2020, p. 4).

In line with this concern, Hess and Waller (2020) note that while it is important to analyse what is said (and by whom) in local news, it is also important to explore what is not said because of the eloquence that what is left unsaid (and possibly also by whom) can have. "Routinely viewed as undemocratic, in binary opposition to voice, and as a barrier for minorities (and also sometimes for journalists themselves), silence remains under-examined and under-theorised in the garrulous excesses of the digital age" (Hess & Waller, 2020, pp. 586–587). This growing interest in the field of local media has a singularity, Guimerà et al. (2018) point out: "[it] is often accompanied by a sense of urgency, the feeling of approaching an object of study in danger of extinction, and the desire to contribute to its survival" (p. 5).

4. Conclusion

Within the broader media crisis, local journalism is being reconfigured in terms of its audience engagement practices and strategies, business models, news formats, and a certain reflection on journalistic values. In recent years, research interest in this field of study has flourished, prompting a review of its path. There are calls to refine terminological rigour and study realities under-represented in literature. There are also calls for creating a shared meaning encompassing the common interest of mapping, understanding, and even supporting local journalism in its survival — and, more than that, in its progress and sustainability.

The field's main issues encompass the collapse of the traditional business model and platform competition, the rise of news deserts and the erosion of proximity in journalistic practices. As for the challenges, we highlight those posed by the emancipation of audiences, which are pushing journalists to review and confront their traditional news values and professional practice rituals, as well as a flourishing academic interest in this field of study.

Translation: Anabela Delgado

Acknowledgements

The author Dora Mota would like to thank the Fundação para a Ciência e Tecnologia for funding it through a doctoral scholarship with the reference 2023.02037.BD.

References

Abernathy, P. N. (2020). *News deserts and ghost newspapers: Will local news survive?* Hussman School of Journalism and Media. https://www.usnewsdeserts.com/wp-content/uploads/2020/06/2020_News_Deserts_and_Ghost_Newspapers.pdf

Aldridge, M. (2007). *Understanding local media*. Open University Press.

Australian Competition and Consumer Commission. (2019). *Digital platforms inquiry – Final report*. https://www.accc.gov.au/system/files/Digital%20platforms%20inquiry%20-%20final%20report.pdf

Belda, F., & Pimenta, A. (2022). *Digital reduz desertos de notícia. Migração crescente para o digital e redução de desertos de notícia*. Atlas da Notícia.

Binns, A., & Arnold, S. (2020). Death of a watchdog: Reduced coverage of Coroner´s inquests by local media. *Journalism Practice*, *15*(10), 1460–1478. https://doi.org/10.1080/17512786.2020.1776143

Boesman, J., Meijer, I., & Kuipers, M. (2021). "We would never have made that story": How public-powered stories challenge local journalists' ideas of newsworthiness. In M. Temmerman & J. Mast (Eds.), *News values from an audience perspective* (pp. 141–163). Palgrave Macmillan.

Bossio, D., Flew, T., Meese, J., Leaver, T., & Barnet, B. (2022). Australia's news media bargaining code and the global turn towards platform regulation. *Policy Internet*, (14), 136–150. https://doi.org/10.1002/poi3.284

Camponez, C. (2011). Jornalismo regional: Proximidade e distanciações. Linhas de reflexão sobre uma ética da proximidade no jornalismo. In J. Correia (Ed.), *Ágora. Jornalismo de proximidade: Limites, desafios e oportunidades* (pp. 35–47). LabCom.

Ferrier, M., Sinha, G., & Outrich, M. (2016). Media deserts: Monitoring the changing media ecosystem. In M. Lloyd & L. A. Friedland (Eds.), *The communication crisis in America, and how to fix it* (pp. 215–232). Palgrave Macmillan.

Fidalgo, J. (2021, June 26). *A propósito de um prémio Pulitzer para Darnella Frazier*. Repórteres em Construção. https://www.reporteresemconstrucao.pt/2021/06/26/a-proposito-de-um-premio-pulitzer-para-darnella-frazier/

Freeman, J. (2020). Differentiating distance in local and hyperlocal news. *Journalism*, *21*(4), 524–540. https://doi.org/10.1177/146488491988644

Fu, A. (2021, June 11). *Pulitzers award Darnella Frazier a special citation for recording the murder of George Floyd*. Poynter. https://www.poynter.org/reporting-editing/2021/pulitzers-award-darnella-frazier-a-special-citation-for-recording-the-murder-of-george-floyd/

Guimerà, J. A., Domingo, D., & Williams, A. (2018). Local journalism in Europe. Reuniting with its audiences. *Sur le Journalism, About Journalism, Sobre Jornalismo*, *7*(2), 4–11. https://doi.org/10.25200/SLJ.v7.n2.2018.353

Gulyas, A. (2022). Local news deserts. In D. Harte & R. Matthews (Eds.), *Reappraising local and community news in the UK. Media, practice, and policy* (pp. 1–3). Routledge.

Gulyas, A., & Baines, D. (2020). Introduction. Demarcating the field of local media and journalism. In A. Gulyas & D. Baines (Eds.), *The Routledge companion to local media and journalism* (pp. 1–21). Routledge.

Harcup, T., & O'Neill, D. (2017). What is news? News values revisited (again). *Journalism Studies*, *18*(12), 1470–1488. https://doi.org/10.1080/1461670X.2016.1150193

Harris, L. (2021). *The journalism crisis across the world*. Columbia Journalism Review. https://www.cjr.org/business_of_news/the-journalism-crisis-across-the-world.php

Hess, K., & Waller, L. (2020). Moral compass: How a small-town newspaper used silence in a hyper-charged controversy. *Journalism*, *21*(4), 574–590. https://doi.org/10.1177/1464884919886441

Jenkins, J., & Nielsen, R. K. (2019). Proximity, public service, and popularity: A comparative study of how local journalists view quality news. *Journalism Studies*, *1*(2), 236–253. https://doi.org/10.1080/1461670X.2019.1636704

Jenkins, J., & Nielsen, R. K. (2020). Preservation and evolution: Local newspapers as ambidextrous organizations. *Journalism*, *21*(4), 472–488. https://doi.org/10.1177/1464884919886421

Jerónimo, P., & Correia, J. C. (2020). Introdução. In P. Jerónimo & J. C. Correia (Eds.), *O pulsar da proximidade nos media e no jornalismo* (pp. 11–13). LabCom.

Jerónimo, P., Correia, J. C., & Gradim, A. (2020). Are we close enough? Digital challenges do local journalists. *Journalism Practice*, *16*(5), 813–827. https://doi.org/10.1080/17512786.2020.1818607

Jerónimo, P., Ramos, G., & Torre, L. (2022). *Desertos de notícias Europa 2022: Relatório de Portugal*. MediaTrust.Lab/LabCom. https://labcomca.ubi.pt/wp-content/uploads/2023/02/desertos_noticias_europa_2022_.pdf

Jurno, A. C., & D'Andréa, C. (2020). Between partnerships, infrastructures and products: *Facebook Journalism Project* and the platformization of journalism. *Brazilian Journalism Research*, *16*(3), 502–525. https://doi.org/10.25200/BJR.v16n3.2021.1306

Karlsson, M., & Rowe, E. H. (2019). Local journalism when the journalists leave town: Probing the news gap that hyperlocal media are supposed to fill. *Nordicom Review*, *40*(Special Issue 2), 15–29. https://doi.org/10.2478/nor-2019-0025

Leupold, A., Klinger, U., & Jarren, O. (2018). Imagining the city: How local journalism depicts social cohesion. *Journalism Studies*, *19*(7), 960–982. https://doi.org/10.1080/1461670X.2016.1245111

Martins, C., & Gonçalves, T. (Eds.). (2010). *A imprensa local e regional em Portugal*. Entidade Reguladora para a Comunicação Social.

Mathews, N. (2020). Life in a news desert: The perceived impact of a newspaper closure on community members. *Journalism*, *23*(6), 1250–1265.

McNair, B. (2006). News from a small country. The media in Scotland. In B. Franklin (Ed.), *Local journalism and local media. Making the local news* (pp. 37–48). Routledge.

Nelson, J. L. (2021). *Imagined audiences. How journalists perceive and pursue the public*. Oxford University Press.

Neveu, É. (2005). *Sociologia do jornalismo*. Porto Editora. (Original work published 2001)

Newman, N. (2022). Executive summary and key findings. In N. Newman, R. Fletcher, C. T. Robertson, K. Eddy, & R. K. Nielsen (Eds.), *Reuters Institute digital news report 2022* (pp. 9–30). Reuters Institute; University of Oxford. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2022-06/Digital_News-Report_2022.pdf

Newman, N., Fletcher, R., Schulz, A., Andı, S., Robertson, C. T., & Nielsen, R. K. (Eds.). (2021). *Reuters Institute digital news report 2021*. Reuters Institute; University of Oxford. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2021-06/Digital_News_Report_2021_FINAL.pdf

Nielsen, R. K. (2015). Introduction: The uncertain future of local journalism. In R. K. Nielsen (Ed.), *Local journalism. The decline of newspapers and the rise of digital media* (pp. 1–26). I.B. Tauris.

Nielsen, R. K. (2022). Foreword. In N. Newman, R. Fletcher, C. T. Robertson, K. Eddy, & R. K. Nielsen (Eds.), *Reuters Institute digital news report 2022* (p. 5). Reuters Institute; University of Oxford. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2022-06/Digital_News-Report_2022.pdf

Park, J. (2021). *Around the corner, around the world: Reviving local news globally*. International Press Institute. https://ipi.media/wp-content/uploads/2021/05/Local-News-Report-IPI-20210519.pdf

Ramos, G. (2021). Deserto de notícias: Panorama da crise do jornalismo regional em Portugal. *Estudos de Jornalismo*, (13), 30–51.

Rosen, J. (2006, June 27). The people formerly known as the audience. *PressThink*. http://archive.pressthink.org/2006/06/27/ppl_frmr.html

Rosen, J. (2021, June 11). *Hey, this actually happened. https://poynter.org/business-work/2021/pulitzer-prize-winners-2021/* [Tweet]. Twitter. https://x.com/jayrosen_nyu/status/1403422866021011460?s=20

Ross, K. (2006). Open source? Hearing voices in the local press. In B. Franklin (Ed.), *Local journalism and local media. Making the local news* (pp. 232–244). Routledge.

Schudson, M. (2019). Where we are and whither we are tending. *Journalism*, *20*(1), 77-79. https://doi.org/10.1177/1464884918809247

Schulz, A. (2021). Local news unbundled: Where audience value still lies. In N. Newman, R. Fletcher, A. Schulz, S. Andı, C. T. Robertson, & R. K. Nielsen (Eds.), *Reuters Institute digital news report 2021* (pp. 42–47). Reuters Institute; University of Oxford. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2021-06/Digital_News_Report_2021_FINAL.pdf

Silva, C., & Pimenta, A. (2020). Local news deserts in Brazil. In A. Gulyas & D. Baines (Eds.), *The Routledge companion to local media and journalism* (pp. 44–53). Routledge.

Sjøvaag, H., & Owren, T. (2021). The non-substitutability of local news? Advertising and the decline of journalism's umbrella market model. *Nordicom Review*, *42*(1), 1–14. https://doi.org/10.2478/nor-2021-0001

Vos, T. P., Eichholz, M., & Karaliova, T. (2018). Audiences and journalistic capital roles of journalism. *Journalism Studies*, *20*(7), 1009–1027. https://doi.org/10.1080/1461670X.2018.1477551

Biographical Note

Dora Mota has been a journalist since 1999 and is currently a PhD candidate in communication sciences at the University of Minho. Her research focuses on the relationship between local journalism and its audiences, particularly the new Portuguese proximity projects. After graduating in media, she worked for national newspapers and magazines, with her recent career years spent in the Oporto newsroom of *Jornal de Notícias*, one of the country's major publications. Starting October 2023, she secured a PhD scholarship from the Fundação para a Ciência e Tecnologia.

ORCID: https://orcid.org/0000-0001-5308-4568

Email: doramota22@gmail.com

Address: Centro de Estudos de Comunicação e Sociedade, Instituto de Ciências Sociais, Universidade do Minho, Campus de Gualtar, 4710-057 Braga, Portugal

Submitted: 14/04/2023 | Accepted: 17/ 10/ 2023