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SComS
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Editorial

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Dear SComS readers,

We are pleased to announce several innovations at SComS. In July, SComS was added to the Directory of Open Access Journals (DOAJ). This gives our young open access journal more visibility and connects us even better with the growing community dedicated to developing open access journals and making scientific knowledge accessible. In addition, there are technical innovations on the Submission Platform. Authors can now directly enter their ORCID ID as part of the submission process and link their papers to their unique researcher ID. In case you are not familiar with ORCID, you can find more information on <https://orcid.org>.

We would also like to draw your attention to the two open Calls for Papers to Thematic Sections that will be published in future issues of SComS. The guest editors Silke Fürst, Daniel Vogler, Isabel Sörensen, and Mike S. Schäfer will be responsible for the Thematic Section on *“Changes in communication in, from, and about higher education institutions”*. The deadline for full paper submissions is December 12, 2021. The guest editors invite submissions that focus on the communication of higher education institutions (HEIs) from different perspectives, methodologically, theoretically, or conceptually. Exemplary topics concern professionalization tendencies of communication, changes in resources, practices, and strategies as well as the representation of HEIs in different forms of discourse and their perception. A detailed description of the foci and topics can be found on the SComS

website under the menu item “Call for Papers” (<https://www.hope.uzh.ch/scoms/cfp>). There, interested users will also find the Call for Papers for a second Thematic Section entitled *“Historizing international organizations and their communication – Institutions, practices, changes”*. The deadline is January 30, 2022. Guest editors are Erik Koenen, Arne L. Gellrich, Christian Schwarzenegger, Stefanie Averbeck-Lietz, and Astrid Blome. The Thematic Section invites submissions that examine the history of international organizations and their communication based on concrete international organizations that serve as examples and case studies. Moreover, manuscripts should address one of the following three problem areas: 1) Communication and communication management of international organizations, 2) international organizations, media, and journalism, or 3) international organizations in the public sphere.

Let us now turn our attention from future issues to this issue of SComS. It contains four articles in the General Section, a Thematic Section entitled “Critical perspectives on migration in discourse and communication,” and two book reviews in the Reviews and Reports Section. In addition, the Community Section contains the summary of Sina Blassnig’s dissertation, which was awarded the 2021 Dissertation Prize of the Swiss Association of Communication and Media Research (SACM). On a sad occasion, the issue also contains an obituary of the communication and media scientist Michael Schanne.

The first paper of the General Section is entitled “Four pillars of Luhmann’s ana-



lytical apparatus: Applications for communication research.” In this article, YJ Sohn devotes herself to a detailed discussion of Luhmann’s theory of social systems. The author uses a controversy around Luhmann’s theory as a starting point: While some researchers see methodological implications as the core of the theory, others describe the theory as inapplicable and detached from empirical research. The author wants to refute the latter criticism in particular. To this end, she defines the core concepts in Luhmann’s theory and shows how these can be examined and even lend themselves to an operationalization for different methods (form analysis, observation analysis, differentiation analysis and semantic analysis). She then incorporates these concepts and methods into an integrative model with the aim to make Luhmann’s theory increasingly and more easily applicable for empirical communication research.

In the second article, Lídia Raquel Herculano Maia, Olga Demushina, and Stephen D. McDowell examine the “Vertical and horizontal communication on the Facebook pages of 2014 Brazilian presidential candidates.” In their empirical study, the authors analyze the official Facebook Pages of the presidential candidates at the time of the campaign. In addition to the candidates’ messages, the comments by supporters as well as by supporters of opposing candidates were examined in depth using a qualitative content analysis. Particular attention was paid to vertical and horizontal interactions, i. e., interactions between users and the candidates, as well as among the users of different camps themselves. The authors identified various patterns of interactions and showed in particular that vertical interactions remain rather a rarity and are only used in particular cases. The authors explain this, among other things, with technical aspects and the interface design – i. e., the discursive architecture of the platform. If candidates respond to critical comments, for example, these comments simultaneously receive increased prominence, which the candidates naturally try to avoid and thus not react to the comments. This is just one

of many results with which the researchers point to the interconnectedness of political strategies and platform affordances. The authors believe that it is above all the vertical interactions, i. e., between elites and voters, that represent a highly relevant area for future research. After all, these interactions are essential for democratic processes under digitized conditions.

In “Use of science in British newspapers’ narratives of climate change,” Maria Laura Ruiu and Massimo Ragnedda address a key issue of our time, climate change, and its framing in the British press from 1988 to 2016. The authors found that the framing differed according to the political orientation of the papers, with center-left papers’ increasing certainty about the science of climate change and the center-right newspapers’ increasing confusion. Center-left newspapers presented a scientific consensus about the long-term risks / consequences and visible signs of climate change highlighting their increasing severity. The center-left papers reported that scientists agree that there is still time to make changes and adapt, noting the climate scientists’ involvement as political and economic advisors. The newspapers also addressed skepticism, framing it as driven by economic and political interests and emphasizing conflicting scientific views. Center-right newspapers supported those interests as they vacillated between questioning and accepting the science of climate change. In the first, they focused on the scientific disagreement, concluding even that climate change is a myth. They also emphasized scientific dishonesty of “eco-doomsters” as well as uncertainty. But the reporting was complex as it also presented scientific consensus, and shifted over time from reporting about the impact on nature and the poor, to impossibility of acting, to contingent acceptance of scientific findings.

Another crucial issue of our times, migration, is addressed in “No government mouthpieces: Changes in the framing of the ‘migration crisis’ in German news and infotainment media,” where Dennis Lichtenstein examines the framing of refugees in 2015 and 2016 by German public

broadcasting news as well as talk and satirical shows. The study centers on whether the assaults on women in Cologne on 2015 New Year's Eve changed media frames and how they deviated from frames in official governmental communication. The author found that while the government showed ambivalence about its policies after the incident, the media did not parallel the government line and were already critical of the policy in 2015. Talk shows and, especially, satirical shows showed more support for the "open door" policy and criticized xenophobic tendencies in the German society in early 2016. The infotainment media paralleled the government only in representing the "migration crisis" as a German issue first, and European second, before the 2015 NYE, whereas afterwards, the government externalized the blame for the arrival of refugees, while the media did not follow. The media also underemphasized the global dimension of refuge seeking, limiting information about the causes and complexity and restricting ideas about how to solve the problems.

Representation of migration in discourse is also the topic of the Thematic Section "Critical perspectives on migration in discourse and communication", edited by Dimitris Serafis, Jolanta Drzewiecka, and Sara Greco. The phrase "the so-called 'migration crisis'" calls attention to the self-centered European politics of naming the 2015 refuge seeking by people fleeing desperate conditions, while the developing countries host the majority of displaced people. While the numbers were significant, so was the precarity and mortality (over 4000 are estimated to have died only in the Mediterranean Sea, the numbers went up to over 5000 in 2016) along the refugee routes. Yet, as the editors note in their introduction, global developments continue to forcibly displace people. Thus, critical scholarship continues to investigate discourse about refugees after 2015, examining, for example, how the Covid-19 health situation impacted representations of refugees, or the evolution of anti-refugee right wing discourses. The Thematic Section presents a sample of this research,

with five papers showcasing different methods and contexts.

The introductory contribution of the Community Section is the summary of the dissertation by Sina Blassnig entitled "Populist online communication: Interactions among politicians, journalists, and citizens." The dissertation was awarded the 2021 Dissertation Prize of the SACM. It is a great pleasure for us to be able to make it available to our SComS readers. Every year, the SACM Dissertation Award honors the best PhD thesis in communication and media research completed at a Swiss University, or by researchers of Swiss origin. Based on her empirical studies that use manifold methodological approaches, Sina Blassnig develops a heuristic model of populist communication. This model is an important contribution for studying populist communication in an area in which "the roles of politicians, the media, and citizens have become more interconnected and reciprocal in an online communication environment" (p. 383). Examining populist communication is a highly topical research need considering the increasing polarization of society dividing populist and anti-populist opinions and communication strategies. We congratulate Sina Blassnig on this extraordinary achievement and invite our readers to read the summary of her excellent cumulative thesis.

The Community Section is concluded by the obituary for Michael Schanne who sadly passed away in August 2021. Heinz Bonfadelli, Werner A. Meier, and Vinzenz Wyss commemorate him and pay tribute to his scientific legacy in the research field of science, risk, and health communication and highlight his critical spirit.

In the Reviews and Reports Section, we present two book reviews: First, Roger Blum discusses the monograph "Kommunikations- und Mediengeschichte. Von Versammlungen bis zu den digitalen Medien", by Philomena Schönhagen and Mike Meißner. Blum particularly highlights and lauds the emphasis on the Swiss context. Continuing a dear tradition to SComS, the book review is presented in three languages: German, French, and Italian. The sec-

ond book review by Ursula Ganz-Blättler discusses the anthology “Streitlust und Streitkunst. Diskurs als Essenz der Demokratie” edited by Stephan Russ-Mohl. Ganz-Blättler particularly highlights the value and importance of the programmatic heterogeneity within the publication and the important contributions it provides but also critically points to discrepancies with respect to the overall aim of the book.

Finally, we would like to sincerely thank all reviewers who reviewed manuscripts in 2020 and supported the authors by providing detailed feedback and constructive suggestions. Without you, dear reviewers, SComS could not prosper successfully. We thank Argiris Archakis, Dorothee Arlt, Stavros Assimakopoulos, Ángel Barbas Coslado, Márton Bene, Samuel Bennett, Sina Blassnig, Salomi Boukala, Gloria Dagnino, Massimiliano Demata, Alexan-

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We hope you will enjoy reading this issue!

Katharina Lobinger, Jolanta Drzewiecka, and Mike Meißner

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General Section

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Four pillars of Luhmann's analytical apparatus: Applications for communication research

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Abstract

By extending Andersen's (2003) propositions, the current paper formalizes Luhmann's four fundamental analytical frameworks and proposes a model that delineates the relations among them. That is, with the form analysis as the base framework, observation analysis is considered the social extension of form analysis as it involves the distinction observer/observed or ego/alter. Differentiation analysis is described as the factual extension of form as it distinguishes a system (this) and everything else (in its environment). Finally, semantic analysis is considered the temporal extension of form analysis as it focuses on the condensation of meaning over time. In addition, to overcome the abstractness of descriptions in the existing literature, this paper suggests the workable definitions that operationalize the analytical frames. Rich research examples are also presented to demonstrate the broad applicability of the four frameworks in communication research and their analytical gains. These theory-driven analytical frameworks are expected to provide meaningful connections between empirical data and theories, thereby enriching the field of communication research. In turn, more empirical applications will contribute to Luhmann's systems theory by bringing in productive insights.

Keywords

Niklas Luhmann, systems theory, communication research, analytical frameworks, form analysis, observation analysis, differentiation analysis, semantic analysis

1 Introduction

Luhmann is undoubtedly one of the most original and controversial theorists in the late 20th century. His innovative insights have challenged the old continent's thinking and provided productive reservoirs of inspiration for countless researchers. Nevertheless, his theory of social systems seems to remain within the closed circle of avid followers and has been completely neglected by outsiders, especially in the Anglophone academic scene.¹ Many scholars argue that, despite his status as one of the dominant theorists in Europe, Luhmann has been unfairly undervalued in the Anglophone world (see, for instance, Andersen & Stenner, 2020; Bergthaller & Schinko, 2011; Borch, 2011; Roth, 2011). The underutilization of Luhmann's theory can be partly explained by the criticism

of its limited research applications. To his critics, Luhmann's highly abstract macro-perspective lacks effective operationalization, thus is non-conducive for empirical scientific research (Baralou, Wolf, & Meissner, 2012; Johnson & Leydesdorff, 2015; Šubrt, 2019).

Contrary to this claim, some argue that the methodological aspect is at the center of Luhmann's theory (e.g., Besio & Pronzini, 2011; Borch, 2011; Roth, 2014b; Roth, Melkonyan, Kaivo-Oja, Manke, & Dana, 2018). For the intention of the systems theory is to use the theory as a *method of discovery* that identifies the complex forms which generate and process information within a system (Luhmann, 1997/2012, p. 13; Roth, 2014b, p. 41). Therefore, Brier, Baecker, and Thyssen (2007, p. 9) rightfully argued that for Luhmann there is no distinction between developing a theory and applying it because his theory itself is an applied research of describing the society. In this vein, Roth et al. (2018) described

1 For the polarized acceptance of Luhmann's systems theory in the Anglophone academia, see Arnoldi (2001), and Roth (2011).



Luhmann's theory of systems as a *theory-method*. By leaning on Merton (1959), the authors contend that “the quality of such a theory-method is consequently not in its robustness against falsification” but “in the scale and scope of scientific problems this theory allows to generate” (Roth et al., 2018, pp. 584–585).

Indeed, Luhmann's theory has offered epistemologically solid perspectives of seeing the world, while practically guiding research for describing and theorizing society. According to a recent quantitative content analysis of Luhmannian research published in English-language academic journals, 62.3% of the articles printed in the 2010s adopted Luhmann's theory as guiding frameworks, thus demonstrating the instrumental potential for the theory that can lead to fruitful research streams (Sohn, 2020). However, his theoretical approaches have been adopted by researchers under the umbrella term of *systems theory* without proper labeling or discernment, mainly due to the lack of literature that systematically classifies the full gamut of Luhmann's theoretical-methodological constructs. An exception is Andersen's work (2003), which tackled this issue by putting forth Luhmann's five analytical strategies – *form*, *system*, *differentiation*, *semantic*, and *media analyses*. Also, noting the connections among these strategies, he called for a systematic reading of the links among the different analyses (Andersen, 2003, p. 88).

Against this backdrop, by extending Andersen's (2003) study, the current paper undertakes three research tasks: *first*, it explores Luhmann's fundamental analytical frameworks and the relationships among them, therefore developing a conceptual model linking the frameworks; *second*, it presents workable definitions of the frameworks, which can provide practical guidance for communication research; and *third*, it demonstrates the analytical gains when employing them. With these efforts, this paper will provide valuable resources for researchers searching for robust discourse frames or theory-driven frameworks for empirical research.

2 Luhmann's four fundamental analytical apparatus

Luhmann's systems theory starts with *forms of distinction* that distinguishes a system from its environment, and *observations* that enable describing how social systems reduce complexities of the environment and *differentiate* subsystems. And all operations of complexity reduction in social systems are based on *meaning*. Accordingly, this paper proposes Luhmann's four fundamental analytical frameworks: *form analysis*, *observation analysis*, *differentiation analysis*, and *semantic analysis*. These four frameworks are selected since they serve as foundations for other frames in Luhmann's analysis. For instance, a study that adopts the system-analytical strategy or media analysis in Andersen's (2003) list either implicitly presupposes or explicitly utilizes one or more of these four basic frameworks.² Another point breaking with Andersen (2003) is the inclusion of the *observation analysis* as one of the basic frameworks. Andersen (2003) discusses “point of observations” as a part of the differentiation framework. However, in addition to providing a reference point for other analyses, observation analysis has its unique functions, as demonstrated in the following discussion.

2.1 Form analysis

Form of distinction. In his magnum opus, *Die Gesellschaft der Gesellschaft*, Luhmann (1997/2012, p. 28) argued to speak of not *objects* but *distinctions*. Without distinctions, we would not be able to indicate or observe anything. Hence, Luhmann (2002/2013, p. 49) stressed, “draw a distinction, otherwise nothing will happen at all”. Here, a distinction is considered a boundary or “the marking of a difference” (Luhmann, 2002/2013, p. 49). As such, the term distinction is indispensable in understanding Luhmann's conceptual architecture. Luhmann further refined this concept based on the concept of *form* by drawing on Spencer-Brown (1969). Luh-

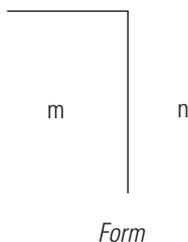
2 The “system analytical strategy” is based on the analyses of form, differentiation, and observation, while the “medium strategy” involves the form and differentiation analyses.

mann defined a *form* as a distinction that has two sides (Luhmann, 1997/2013, p. 10; 2002/2013, p. 51). Here, a form is not an ontological representation, but the *form of distinction* that enables something to exist. To illustrate, drawing a circle on a plane creates two divided spaces (i. e., the inside and outside of the circle), the circle itself, and the whole space that includes all. This illustration implies that even space itself is distinguishable only after a distinction has been implemented. Therefore, a form is a triggering moment that generates all (Lee, 2013, p. 43). In the same vein, Luhmann (2002/2013, p. 49) stated,

evidently, creation is nothing but the injunction “Draw a distinction!” Heaven and earth are thereby distinguished, then man, and finally Eve. Creation is thus the imposition of a mode of distinguishing, if God himself is beyond all distinction.

Only after a form is created can one distinguish and mark one side of the divided spaces. An implication is that a form contains two components: *distinction* (marked by a vertical line) and *indication* (marked by a horizontal line) (see Figure 1). We can observe things only by indicating one side, not the other, within the frame of distinction. This formula shows the asymmetry of distinction, which indicates the inside of the distinction as the marked state (*m*), leaving the outside as unmarked state (*n*). Drawing a distinction imposes an indication of a marked side. In this formula of form, we can *cross* the distinction from one side to the other with a deferred time, but not simultaneously indicate both sides (Luhmann, 1997/2012).

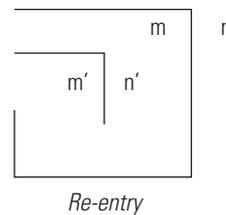
Figure 1: A *form* of distinction



Therefore, we can oscillate focus between the two sides, but never see the unity of the distinction between the two states. To see this unity, we require another level of reflection.

Here comes the concept of *re-entry*. Re-entry means a distinction copied into the distinction itself or, “the re-entering of the form into the form or of the distinction into the distinguished” (Luhmann, 2002/2013, p. 54). The first distinction is what is actually used, and the re-entered distinction is what is reflected on (see Figure 2). The distinction of a form can have a chain of re-entries.

Figure 2: A *form* of re-entry



To illustrate, let’s call a marked state of a distinction *health*. While the content of *health* is indicated, the other side (i. e., the unmarked state) remains unknown, thus forming the state of *non-health* (i. e., something that is not “health”). The operation of re-entry copies the distinction *health/non-health* into the context of health. Then, the distinction health / non-health along with the content of non-health can be scrutinized in the context of health. This reflection reveals a representation of the distinction *health/illness*. In this example, the content of non-health (the original unmarked state) is not the same as that of illness (the reflected unmarked state), and the initial distinction health / non-health differs from the reflected distinction health / illness.

Form analysis. Form analysis takes the central position of all analyses since it is the starting point of all the guiding frameworks. Andersen (2003, p. 78) described form analysis as “the analysis of the conditions of communication given a specific difference, the guiding distinction of form

analysis being unity / difference". It implies that investigating the distinction itself (i. e., the unity of distinction) as a blind spot reveals the conditions that enable the communication. In more workable terms, this paper suggests that form analysis involves (a) examining a distinction that makes a difference between two values, and (b) tracking the re-entries of the distinction. Then this form analysis allows understanding the nature of specific communication. For instance, we can answer the question of what "health communication" is by identifying the form health / illness. Once one side of the binary distinction is indicated, another distinction can be drawn within this selected side – i. e., the re-entry of distinction. That is, we indicate the health side, and make a further distinction in this side, distinguishing physical and mental health. This analysis of re-entry can continue multiple times.³

In addition, as a form has two sides by definition, indicating the marked side always carries the other unmarked side as the context (Baecker, 2006, p. 124). For instance, indicating "men" presumes a distinction and is meaningful only with the unmarked side such as "women" or "animals". Here, "women" or "animals" not only are the counter-concepts of men but also provide the context in which "men" is interpreted. Forms, therefore, appear to have the communicative structure of *concept/counter-concept* or *concept/context*. Hence, we can capture the underlying meaning of communication by identifying the binary distinction *concept/counter-concept* or depict the framework of communication by examining the *concept / context* form. For instance, if a term frequently appears in the news media, we can use form analysis to investigate the counter-concept that is ignored in the media reports and thereby locate the unity of the distinction, which will, in turn, reveal the latent or hidden framing that the media reports play with.

The discussions above lead to a working definition of form analysis: *the analysis*

3 Likewise, we can start with the illness side and continue making further distinctions to reveal what constitutes the concept of illness.

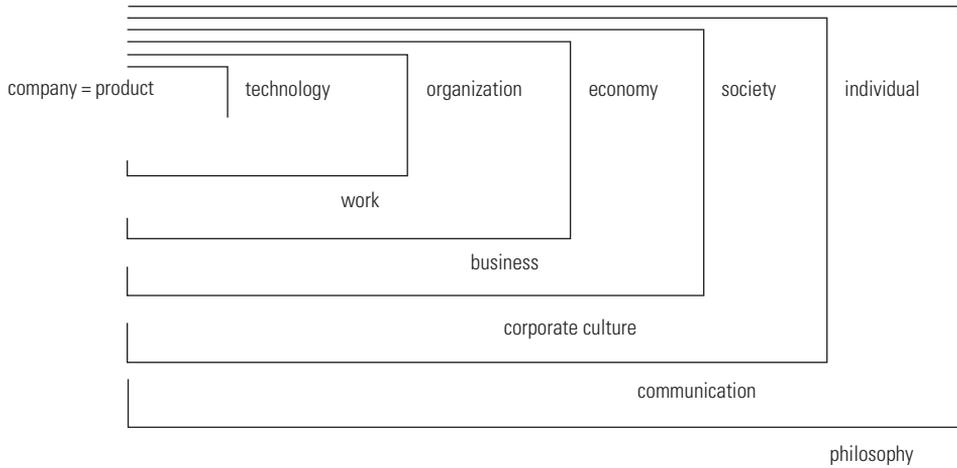
of the unity of binary distinctions and their re-entries for identifying the nature of social constructs underlying communication and the conditions of their interpretations by using the scheme of concept/counter-concept or concept/context.

Applications of form analysis. There are several ways of applying form analysis in communication research. First, form analysis is useful for defining concepts or capturing the underlying meanings. For instance, Seidl (2007) used the distinction knowledge / nonknowledge to define intelligence. That is, the author considers intelligence as the re-entry of nonknowledge into knowledge, thus conceptualizing intelligence as the ability to deal with nonknowledge. In this sense, the intelligence of an organization is defined as "the extent that it is aware of its nonknowledge and takes account of this nonknowledge in its operations" (p. 16). In addition, form analysis is a useful tool for detecting and overcoming false distinctions. Spencer-Brown (1969, p. 1) stated that "distinction is perfect continence". This means that a distinction between the concept/counter-concept should be both jointly exhaustive and mutually exclusive (Roth, Valentinov, & Clausen, 2020, p. 682). For instance, man vs. nature is false because the two poles are not mutually exclusive (Roth et al., 2020, p. 682). In the same vein, Luhmann (2005) rejected the distinction security / risk since security cannot operate as the counter-concept to risk. Instead, he suggests the distinction risk / danger for analysis.⁴

Second, form analysis can be adopted for detecting emerging communication themes. Gregory, Gibson, and Robinson (2005) explored the core distinctions underlying the participants' communications in the oral health context. In this study, they examined categories emerging

4 Boholm (2008), for instance, examined the communication at public consultation meetings about environmental risk by using the distinction risk / hazard (or risk / danger). The author revealed that, while decision-makers perceived the negative consequences as risks, those affected by a decision (i. e., stakeholders) took them as hazards (or danger).

Figure 3: The form of the firm depicting the contexts where the operations of a firm occur



Source: Baecker, 2006, p. 127.

in dentist-patient conversations, searched for the opposing positions (i.e., counter-concepts), and relabeled the distinction unities by connecting the positive / negative pairs. As a result, six emerging dimensions of the meaning of oral health were identified.⁵

Third, form analysis can facilitate the sensemaking of specific concepts by articulating the contexts in which the concepts are communicated. Baecker (2006), for instance, presented a model that analyzes the structure of organizations based on six distinctions of concept / context and five levels of re-entries: work, business, corporate culture, communication, and philosophy (see Figure 3). This model offers a new perspective for understanding firms' structures and the broader contexts in which their communicative operations occur. Researchers can utilize this kind of form analysis using a chain of re-entries of

form to locate the context against which meaning makes sense or to identify factors that affect communication phenomena. For example, analyzing health organizations with a chain of re-entries will help to understand the contexts and elements for health communication.

2.2 Observation analysis

Observation. Based on Spencer-Brown's form calculus, Luhmann unfolded his discourse on *observation*, the concept that involves distinction and indication (Luhmann, 1997/2012, p. 34). Every observation is tied to the selected distinction. For example, if we observe with the distinction legal / illegal, the potential for the indication is either legal or illegal – and nothing else (Kneer & Nassehi, 2008, p. 134). While an observation involves indicating one or the other side of a distinction, the distinction itself – i.e., the *unity of distinction* that simultaneously separates two sides and holds both sides together – remains hidden as long as it is used for observation. The distinction is the “excluded middle that cannot be observed” (Luhmann, 1997/2012, p. 29) and serves as the “invisible condition of seeing, as *blind spot*” (p. 35, emphasis added). For instance, if we attempt to indicate the distinction le-

5 The emerging categories are positioning of the norm (health / disease); positioning of attribution (internal / external); positioning of dentistry (trust / distrust); positioning of accessibility (choice / no choice); positioning of commodity (embracing / rejecting); positioning of authenticity (natural / unnatural); positioning of character (admiring / denigrating).

gal/illegal for an observation that uses this distinction, we fall into a paradox of determining whether the distinction legal/illegal itself is legal or illegal. In a sense, the distinction itself is like *perspective*: “the perspective is not seen by the one who sees by means of it” (Luhmann, 2002/2013, p. 113).

One way of addressing this blind spot issue is *re-entry* as described above. The re-entry can be also applied to the distinction observer/observed. For an observer to perform observation, the distinction *observer/observed* should be hidden to the observer as a blind spot and the condition of observation. The observer can reflect on this distinction by copying the distinction observer/observed into the observer side to reflect on the observed. However, this re-entry causes a paradox of self-inclusion as the observer becomes the object of his own observation. This status is like a Cretan saying, “all Cretans are liars”. Therefore, to de-paradoxify, the observer should distinguish *self-* and *other-observations*. Self-observation occurs when the observation indicates the reflected observer, while other-observation indicates the reflected observed.⁶

Nevertheless, the re-entering of the distinction observer/observed into the observer side does not allow the observer to see the original distinction. Nor is the original observer the same as the observer reflected by the self-observation. The initial distinction can be observed only by another observer – that is, a *second-order observer*. The *second-order observation* means the observation of an observer (Luhmann, 2002/2013, p. 111). A second-order observer can see what is observed by the first-order observer *with what distinction, along with what the first-order observer cannot see*. While the

second-order observation can observe the blind spots of the first-order observation, it is also tied to its distinction, thus having its own blind spots of observation. In this sense, the second-order observation is also the first-order observation.

Observation analysis. Observation analysis has two dimensions: observation based on the distinction *self-/other-reference* and that based on the distinction *first-/second-order observation*. The distinction self-/other-reference is related to the re-entry of the distinction observer/observed into the observer side. Self-reference is the observation of the observers themselves, while other-reference is the observation of the observed other than the observers. Here, self-reference is the observers’ self-reflection in which they ask with which specific distinction they observe and what the consequence of the selection has on other-observation. In this sense, the analysis of self-/other-reference becomes the point-of-reference analysis. For instance, researchers can reflect on with which reference points they observe and how their observations are affected by switching their reference points.

Meanwhile, by drawing on Spencer-Brown’s form calculus, Luhmann described re-entry as “a boundary operation of a calculation which remains at the level of first-order observation and within the context of binary distinctions” (Luhmann, 1996/2000, p. 10). In this sense, self-/other-references constitute the first-order observation, which, in turn, is analyzed through the second-order observation concerning the observation of an observer. The primary difference between the first- and second-order observation is that the first-order observation is the observation of *things* or target objects. In contrast, the second-order observation is the observation of *observations*. More formally, the first-order observation concerns using a specific distinction, whereas the second-order observation concerns making that distinction the object of observation (Bette, 2015, p. 61). Therefore, first-order observers usually ask “what-questions”, whereas second-order observers ask “how-questions” about the way in which

6 To illustrate, imagine two persons A and B. At first, A sees that B differs from him. To compare with B, A chooses the distinction successful/non-successful. Based on this distinction (i.e., the re-entered distinction), A constructs an image of B (i.e., other-observation) as a successful person, as well as that of himself (i.e., self-observation) as an ordinary person.

the first-order observer sees the world. For instance, the second-order observation in the disaster communication context can offer new insights by shedding light on “who defines what, when, how, in which context, and with what consequences in the processes and dynamics of disaster-related communication” (Egner, Schorch, Hitzler, Bergmann, & Wulf, 2012, p. 250). Besides, the second-order observers can see what the first-order observers cannot see – i.e., the specific distinctions that they use for observation and the unindicated content or states. In this vein, the second-order observation can be a powerful tool that enables the reflection of the structures and processes of the first-order observations and questions what remains hidden and non-transparent in the processes (Bette, 2015, pp. 60–61).

By combining the two dimensions, observation analysis can be defined as *the analysis of the points of reference and the consequences of their selections based on the guiding distinction observer/observed, which includes the distinction self-reference/other-reference and the distinction second-order/first-order observation*.

Applications of observation analysis. As described above, observation analysis is often adopted to observe the difference between the first- and second-order ones. In a study of environmental risks, Boholm (2008) distinguished the first-order observers who were directly affected and the second-order observers who were regulators and decision-makers of the public project and examined the different perceptions of risks between them. The analysis can also be used to reflect on how a choice of reference point affects observation. Kiisel and Vihalemm (2014), for instance, analyzed personal interpretations of warning messages by comparing the direct approach (i.e., first-order observation) with the reflective approach (i.e., second-order observation) and examined how this difference in the level of observation explained the variations in the personal sense of risk, which in turn shaped the reception of a warning message. The authors found that the first-order or direct observers treated the situation given

as taken-for-granted and asked how dangerous it was and what they should do. On the contrary, the second-order observers⁷ asked how adequate their construction of the situation was and whether they could trust themselves in trusting the message. This study demonstrates that second-order observation involves evaluating the message along with the messenger, and an awareness of the self as an observer, while first-order observation can avoid time-consuming complexity by accepting the message as trustworthy (Kiisel & Vihalemm, 2014, p. 278).

Observation analysis is also utilized to offer practical directions for organizational communication. For instance, Andersen and Born (2007) examined the construction of corporate messages by observing how organizations describe themselves. The authors showed that a firm utilizes multiple levels of observation to describe its identity, which emerges differently depending on the position from which it is articulated. They found that organizations communicate established identities, frameworks and operations in the first-order level (e.g., “We at Lego”); claims to control, modify, and / or change organizational principles of identity and operation in the second-order level (e.g., “Lego is (no longer) a force for innovation”); and claim awareness and influence over the reflexivity in the third-order level (e.g., “Lego has had to understand when to support democracy and participation”) (Andersen & Born, 2007, p. 183).

As such, research that adopts observation analysis shows the necessity of more complex considerations in message constructions since both the message creators and recipients are not one-dimensional and more complicated. In this sense, observation analysis provides a useful device for identifying conditions that influence the perceptions of observers and, thus, understanding how messages are created, presented, and interpreted in specific ways. Therefore, observation analysis can

⁷ In this study, the second-order observers were directed to consciously consider the aims of different messages and accounts of an event.

be applied to build strategies for message construction and delivery, diagnose and resolve conflicts, and provide other practical recommendations for more effective communication.

2.3 Differentiation analysis

Differentiation. In Luhmann's theoretical architecture, the concept of the *observer* is defined entirely formally with the concepts of distinction and indication (Luhmann, 2002/2013, p. 105). Anything that can distinguish and indicate can be an observer. Not only human consciousness, but also any physical, social, and technical process can observe.⁸ Even the theory of social systems can observe. In this context, Luhmann's social systems theory is reformulated as a "theory that observes reality using a specific distinction, namely the system / environment distinction" (Sciulli, 1994, p. 38).

A *system* is here defined as a *form with two sides* (Luhmann, 2002/2013, p. 52), where a system is indicated and the environment remains outside. All systems – physical, psychological, or social – constitute and maintain themselves by creating and maintaining differences from their environments (Luhmann, 1984/1995, p. 17). For instance, if the immune system fails to recognize the difference between its elements and foreign substances, it will no longer exist. To sustain the boundary, systems should be *operationally closed* and *autopoietic*. An autopoietic system means that it (re)produces itself without any external inputs. Operational closure means that a system's operations are connected with its own operations, but not with those of any other system (Moeller, 2012, pp. 56–57). A system has only one type of operation to (re)produce the difference between itself and its environment. As for social systems, the mode of operation is communication, while that of psychic systems is consciousness. Thus, as for social systems,

it is critical to continuously connect communication to further communication for their perpetuations. As such,

the difference between system and environment as a guiding distinction is the point of departure for system-theoretical analysis. (Luhmann, 1984/1995, p. 16)

A critical function of an autopoietic, operationally closed system is reducing the complexity of its environment. Here, *complexity* refers to a state where a system has more than one possibility of connecting its elements for its continuation (Kneer & Nassehi, 2008, p. 150). If a system fails in this function due to complexity overload, it cannot distinguish itself from its environment, and eventually vanishes. In the course of reducing the complexity of the environment, however, a system necessarily increases internal complexity. To analogously compare, a system is like a board game, which starts with simple rules to imitate the real world, but soon develops its own various rules and strategies as the game goes on. Thus, the system eventually reaches a point where it needs to differentiate itself internally to cope with the complexity overload. As a result, the differentiation creates subsystems having their own distinctions within the system. In this context, system differentiation is "nothing more than the repetition of system formation within systems" (Luhmann, 1984/1995, p. 18). For instance, the functionally differentiated subsystems of modern society, such as economic, political, and legal systems are the result of the differentiation of the societal system.⁹ Here, each subsystem becomes the environment of other subsystems. Luhmann's theory of social systems is thereby the response to the questions of how a society deals with complexity and how it is internally differentiated into subsystems (Kneer & Nassehi, 2008, p. 151).

Differentiation analysis. All social systems such as societal function systems,

8 To illustrate, thermostats observe room temperatures to keep them stable; bio cells observe the environments to protect themselves from potential threats, and the mass media system observes society to continue producing information.

9 Roth and Schütz (2015) identify ten function systems of modern society: politics, economy, science, art, religion, legal, health, sport, education, and mass media systems.

organizations, and interaction systems are observing systems that distinguish themselves from their environment through the distinction system / environment and describe themselves with the distinctions. Differentiation analysis then can be broadly defined as *the analysis of the distinction that distinguishes a system from its environment*. Andersen (2003, p. 82) suggested the difference between similarity and dissimilarity as the guiding distinction of difference analysis. That is, differentiation analysis examines the “similarity of the difference between system and environment in social systems”. In this sense, differentiation analysis is considered an analysis of the boundary conditions that demarcate a system and its environment.

The differentiation of social systems entails creating distinct communication forms of different perspectives (Andersen, 2003, p. 82). It is a natural consequence as social systems have communication as their operational mode. Differentiation analysis then involves the analysis of communication forms that a system uses for its observation and self-description. And the analysis of communication forms in modern society involves examining the *codes* and *programs* of the societal function systems such as economy, politics, and law. A code is a binary steering distinction of a societal function system. Communication of function systems is structured through the binary code, which marks the boundary of each function system (Luhmann, 1986/1989, p. 36). The code further develops the *symbolically generalized communication medium*. For instance, the legal system is centered on the “norm” medium based on the code of legal / illegal, while the economic system is geared toward “money” medium based on the code of payment / non-payment. The invariant code is then matched by a plurality of programs. That is, codes and programs form a two-stage selection, where codes are pertinent to selecting the particular item of information, programs are to the selection of the field of selection (Luhmann, 1996/2000, p. 18). As a rule of allocating code values, the variant program allows all the various system-relevant val-

ues excluded from the invariant code to be considered part of the system’s communication (Baxter, 2013, p. 171; Luhmann, 1997/2012, p. 217).¹⁰

In summary, this leads to the following working definition of differentiation analysis: *the analysis and its application of the boundary conditions distinguishing a system from its environment by using communication forms such as steering binary codes, medium, and/or variant programs utilized in the system*. The “application” is added to the definition to emphasize the practical characteristics of differentiation analysis. Indeed, differentiation analysis should be considered to have two levels: On the first level, differentiation analysis concerns examining the differentiation phenomena and the communication forms accompanied by the differentiations; and the second level involves applying the communication forms as the *framing* of communication in research.

Applications of differentiation analysis. Differentiation analysis in communication research is adopted to explore and compare the communication forms or perspectives utilized in different function systems. For instance, Brier’s (2006) case study of “good science gone bad” analyzes the Lomborg case of environmental conflicts in the Agora of the mass media. The study shows how Lomborg used scientific results (allegedly lacking scientific rigorosity) in public debates by switching the frames from truth-based science to economic and political frames. In this study, differentiation analysis reveals a weakness of public knowledge resulting from irreconcilable frames of different systems. In a similar vein, Nobles and Schiff (2004) investigated a legal case that shows how and why legal and medical communications represented in the media select specific information by linking the systems’ respective conditioning codes and programs. The authors argued that the legal communication represented by the media is not adequately described as simplifications or distortions of legal reality,

¹⁰ For the detailed descriptions of codes, programs, and mediums of the modern function systems, refer to Roth and Schütz (2015).

just as the legal system unavoidably fails to represent the meaning that medical communication has within its system (Nobles & Schiff, 2004, p. 221).

As such, differentiation analysis provides a useful tool for media studies, especially for exploring media frames or representations and how the media thematize an issue. Görke (2001) and Görke and Ruhrmann (2003) compared journalism and entertainment as separate systems in terms of the function, code, and programs, and contrasted their discrete roles in the construction of generic risk in public communication. The authors depicted that journalism selects events as actual (of the actuality / potentiality distinction), whereas entertainment selects the reference side (i.e., potentiality side) or the horizon of contingency, thereby providing the public with alternatives for action. Therefore, the authors argued that both journalism and entertainment are an integral part of public communication.

Differentiation analysis can also offer a practical scheme for media discourse analysis or content analysis by providing communication frames based on the codes, medium, and programs. For instance, Stephens, Rand, and Melnick (2009) utilized six discrete frames (i.e., technical, economic, environmental, health and safety, political, and aesthetic / cultural frames) in assessing the risks and benefits associated with wind power technology in media reports. Roth (2014a) also applied differentiation analysis to compare word frequencies based on the medium and code of each function system (e.g., policy, economy, science, art, and law) by using *Google Ngram Viewers*. The result was then used to show differences in trends in functional differentiation across cultures and over time. In this study, differentiation analysis offers the framing for observing social changes by presenting keywords (codes) of research.

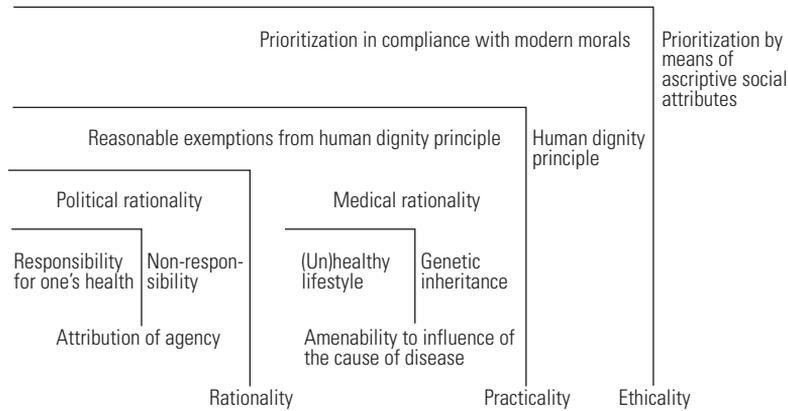
Furthermore, differentiation analysis brings rich insight into organizational communication research. For instance, Andersen and Born (2007) examined heterophonic organizations that do not have a primary link to a single perspective but

have multiple logic such as law, education, politics, economy, help, and love systems. The authors showed how the heterophonic organizations that oscillate among multiple functional codes in communications initiate codified communication by using a semantic trick called *shifter* (i.e., a code that initiated communication or the switching point between the codes).

Meanwhile, differentiation analysis can be utilized in conjunction with other analytical frames. Schirmer and Michailakis (2011), for instance, analyzed the responsibility principle in healthcare priority-setting by deconstructing the human dignity principle based on a series of form-buildings and re-entries of the form. This form analysis is combined with differentiation analysis that depicts the different rationalities of the medical and the political system. Through the analyses, the authors disclose the responsibility principle as a political attempt to utilize medical reasoning for its purposes, which is fated to fail since politics cannot intervene in medical practice. Figure 4 outlines how the authors utilized form and differentiation analysis.

As seen in the research examples, the key to adopting differentiation analysis is to understand that the communication forms or perspectives of differently coded communication systems are incommensurable with each other because all systems are operationally closed, and no direct exchange is possible between them. Therefore, to narrow the communication gaps among different communication systems and facilitate coordination among them, the process of “translations” of language is necessary. To illustrate, for health communication to make the communication theme in organizational communication that follows the economic logic, health topics should be *translated* into the monetary terms (e.g., “improving the health status of employees contributes to an increase in the firm’s profits”). As such, differentiation analysis has powerful applicability. It offers a useful device not only for diagnosing the problem of conflicting communications but for developing message strategies to resolve the problems.

Figure 4: The analysis of attribution of agency and cause of disease combining form analysis with differentiation analysis



Source: Schirmer & Michailakis, 2011, p. 277.

2.4 Semantic analysis

Semantics. Of all types of systems, social and psychic systems are meaning-constituting systems. Psychic systems are conscious systems that have meaningful experiences, whereas social systems are communication systems that reproduce meaning by using it in communication (Luhmann, 2002/2013, p. 163). As a universal medium, meaning encompasses all. Nothing can go beyond meaning as no operation can begin without using meaning (Luhmann, 1997/2012, p. 18). Luhmann (2002/2013, p. 169) defines *meaning* as the medium that works with the distinction *actuality/potentiality*. As such, the form of meaning has two sides where one side is used at the moment of meaning being formed, while the other side remains as the potentially anticipated – i. e., the *horizon of meanings*. When accepting this conceptualization of meaning, meaning becomes ontologically unstable, as any moment of actualization of meaning generates new possibilities, enforcing a new actualization of meaning. Hence, meaning is viewed as the continual rearrangements of the distinction *actuality/potentiality*, or the constant actualizations of poten-

tialities (Andersen, 2011, p. 253; Kneer & Nassehi, 2008, p. 108).

By contrast with meaning that involves differences reactualized from moment to moment, *semantics* lasts longer and is considered relatively stable. Luhmann defines semantics as the “socially available sense that is generalized on a higher level and relatively independent of specific situations” (cited in Moeller, 2006, p. 51). Andersen (2011) described semantics as more “condensed and generalized forms of meaning available to communication operations”, where the term *condensation* refers to a state in which “a multiplicity of meaning is captured in a single form, which then becomes available to an unspecified communication” (pp. 253–254). By *generalized forms of meaning*, semantics is depicted as repeatable forms of meaning preserved for the reproduction of communication (i. e., linking communication to further communication) (Andersen & Born, 2000, p. 304; Luhmann, 1984/1995, p. 282). In a similar vein, Besio and Pronzini (2011, p. 25) described semantics as “communicative forms or distinctions which are standardized, typified and symbolized”.

Semantic analysis. As explained above, semantic analysis uses the distinction meaning/ semantics as its guiding difference (Andersen, 2003, 2011). In addition, for the examination of the semantics and the assignments of meaning in society, Luhmann adopted the scheme of three meaning dimensions: *factual*, *social*, and *temporal*. The factual dimension involves Otherness, in “being-one-thing-and-not-another: a horse is not a cow, a number is not a pleasure, quickness not a color” (Luhmann, 1990, p. 36). The semantic of factual dimension, therefore, uses the distinction *this/everything-else*. The social dimension concerns what one at any time accepts as like oneself (Luhmann, 1984/1995, p. 80) and distinguishes the difference between *self-reference* and *other-reference*. Accordingly, observation of the social dimension is guided by the semantic distinction *us/them*. For instance, Hellenic gets its meaning in contrast with Barbarian. The temporal dimension arranges observations according to the distinction *before/after* or *past/future*. In this sense, the present is conceived as the unity of past and future. And all of the three dimensions involve distinctions with two sides.

Therefore, the working definition of semantic analysis is presented as *the analysis of condensed meaning preserved for the generalized use in a society of a specific period, the analysis which has the form content/counter-content and often involves analyzing factual, social, and temporal dimensions of meaning*.

Applications of semantic analysis. In social research, historically examining the semantics can offer rich insight into the society’s social structures as the semantics of the society and its social structures resonate with each other, even though there is no strict causal relation between semantics and structure (Moeller, 2006, p. 51). In communication research, semantic analysis is adopted mainly to clarify the underlying and implicit distinctions constituting ideas, thoughts, symbols, and so on, that are generally accepted in a specific society.

In communication research, semantic analysis often has the form content /

counter-content just like form analysis. The difference between them is that semantic analysis focuses on the condensation of meaning *over* time (Andersen, 2011, p. 252), whereas form analysis focuses on analyzing the unity of distinctions or forms itself. The general questions of semantic analysis include: “How are meaning and expectations formed and how are these condensed and generalized into concepts, which then establish a semantic reservoir for systems of communication?” (Andersen, 2007, p. 124)

In communication research, semantic analysis is employed to elucidate the underlying distinctions constituting the concepts of interest and depict the nature of social phenomena. For instance, Krichewsky (2017) identified the semantic distinctions that affect defining corporate social responsibility (CSR) communication and practices, including the form ethical / unethical, substantial / window dressing, or useful / not useful.

Meanwhile, semantic analysis often adopts the aforementioned three dimensions of meanings forms: the *factual*, *social*, and *temporal* dimensions. The factual dimension is pertinent to the selection of themes and objects for communication; the social dimension deals with the tension between ego and alter; and the temporal dimension concerns how the tension between past and future is observed and articulated (Andersen, 2003, pp. 87–88). For instance, in analyzing CSR, Krichewsky (2017, p. 516) examined the semantic form socially responsible / irresponsible by asking which distinction refers to things (e.g., high / low levels of pollution as the factual dimension), who promotes or benefits from CSR (e.g., large companies / SMEs as the social dimension), and which comprises distinctions about time (e.g., responsibility for past events / for building a better future as the temporal dimension). Roth (2009, p. 234) also pursued the conceptualization of innovation in the organization setting by asking not just “new with respect to when?” but also “new in comparison with what?” and “new for whom?”. Furthermore, the three semantic dimensions offer useful guiding categories for

Table 1: The summary table of the four analytical frameworks

Framework	Working Definition	Analytical Applications
Form analysis	The analysis of the unity of binary distinctions and their re-entries for identifying the nature of social constructs underlying communication and the conditions of their interpretations by using the scheme of concept / counter-concept or concept / context.	<ul style="list-style-type: none"> –To define concepts by identifying the unity of distinction or performing a chain of re-entries of the distinction. –To capture the underlying meanings. –To locate the hidden or latent communication framing. –To detect false distinctions. –To discover emerging communication themes. –To diagnose the problem in communication and suggest solutions. –To facilitate the sensemaking of specific concepts by articulating their communicative contexts.
Observation analysis	The analysis of the points of reference and the consequences of their selections based on the guiding distinction observer / observed, which includes the distinction self-reference / other-reference and the distinction second-order / first-order observation.	<ul style="list-style-type: none"> –To reflect on how a choice of reference point affects observation. –To question what remains hidden and non-transparent in observations. –To identify conditions that influence the perceptions of observers. –To understand how messages are created, presented, and interpreted in specific ways. –To build strategies for message construction and delivery. –To diagnose and / or resolve conflicts in communication.
Differentiation analysis	The analysis and its application of the boundary conditions distinguishing a system from its environment by using communication forms such as steering binary codes, medium, and / or variant programs utilized in the system.	<ul style="list-style-type: none"> –To explore and compare communication forms or perspectives used for differently coded communication systems. –To provide communication frames for discourse analysis or media content analysis. –To trace changes in the communication modes. –To locate the problems of conflicting communications and develop strategies to resolve the issues.
Semantic analysis	The analysis of condensed meaning preserved for the generalized use in a society of a specific period, the analysis which has the form content / counter-content and often involves analyzing factual, social, and temporal dimensions of meaning.	<ul style="list-style-type: none"> –To clarify the underlying and implicit distinctions constituting meanings, ideas, thoughts, concepts, etc. –To provide useful guiding categories for empirical research. –To depict the nature of social or communicative phenomena.

empirical research. For example, Kasper, Meyer, and Schmidt (2005) explored the perceptions of work-life-balance through interviews by asking: which issues are reported (*factuality*), which “social others” do appear in the interviews and how are they and their expectations described (*sociality*), and how do the interviewees characterize their professional and private past and future and what about their time available for professional and private affairs (*temporality*)?

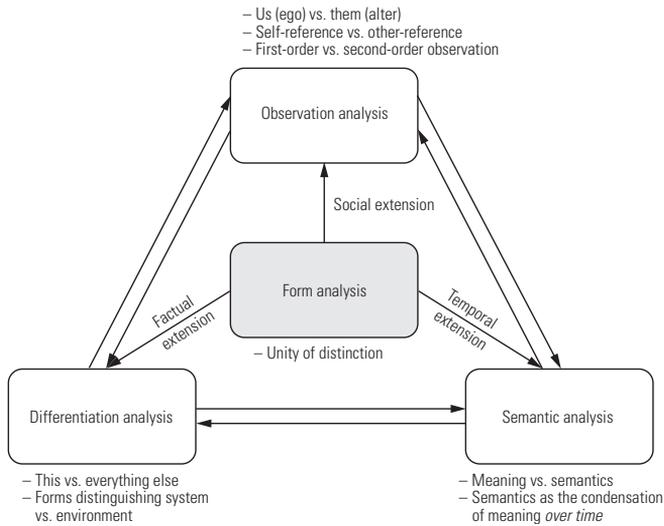
The summary of the working definitions of Luhmann’s four analytical frames and their analytical applications in research is presented in Table 1.

2.5 All-in-one: An integrated model

Since the four analytical frameworks share the same worldview, they are conceptually intertwined so tightly that sometimes it is not clear where to draw a clear-cut border between them. Therefore, for a better understanding of the relations between them, this paper adopts the scheme of *factual*, *social*, and *temporal* dimensions as a heuristic tool and proposes a relationship model.¹¹ In this model, form analysis

¹¹ For the definitions of factual, social, and temporal dimensions, see the section on “semantic analysis”. In Luhmann’s original work, the object dimension is related to differentiation theory, the social dimension

Figure 5: A relationship model of Luhmann's four fundamental analytical frames



is considered the foundation on which all other frames are built and extended. That is, observation analysis is considered the *social extension* of form analysis. For observation analysis involves the distinction observer / observed or ego / alter and takes an observer's position as the departure point. Differentiation analysis can be described as the *factual extension* of form as it distinguishes a system (this) and everything else (in its environment). Finally, semantic analysis is considered the *temporal extension* of form analysis as it focuses on the condensation of meaning *over time*. This model is visualized in Figure 5.

3 Conclusion

By extending Andersen's (2003) propositions, the current paper formalized Luhmann's four fundamental analytical frameworks and proposed a model that

delineated the relations among them.¹² In addition, to overcome the abstractness of descriptions in the existing literature, this paper suggested the workable definitions that operationalize the analytical frameworks. The exemplary communication studies presented in this paper also demonstrated the applicability or adaptability of the frameworks. Furthermore, the present paper showed the extendibility of these analytical frameworks that allows adopting them in tandem with other research methods. These research methods included – and are not limited to – case

¹² Initially, Andersen (2003) developed his proposition on Luhmann's frameworks as discursive analytical strategies. The current paper prefers the term analytical frameworks to emphasize their capabilities of guiding not only conceptual discourses but also empirical research adopting diverse research methods. As demonstrated by the research examples introduced in this paper, Luhmann's analytical frameworks have been employed along with different methods such as case study, content analysis, interviews, focus groups, secondarily data analysis, etc. As to how Luhmann's analytical frameworks can be adopted in conjunction with empirical methods, Besio and Pronzini's (2011) study provides detailed guidelines.

is to communication theory, and the time-dimension is to social evolution theory (Luhmann, 1995). Here, the three-dimensional concepts are adopted as a heuristic tool for the explanatory purpose and not related to the original theoretical constructs.

studies (Brier, 2006; Nobles & Schiff, 2004; Schirmer & Michailakis, 2011), interviews (Gregory et al., 2005; Krichewsky, 2017); focus groups (Küsel & Vihalemm, 2014), and field observations (Boholm, 2008).

As pointed out in the introduction, it is unfortunate that Luhmann's theory has remained marginal in the Anglophone communication scholarship. However, as demonstrated in the research examples presented in this paper, Luhmann's analytical apparatus has broad applicability and has limitless potentials for communication research. Of the vast research ideas utilizing Luhmann's analytical frameworks, for instance, one timely research area is risk communication during a pandemic.

First, *form analysis* can shed new light on defining pandemic communication by seeking the unity of distinction pandemic / non-pandemic and performing a chain of re-entries of this distinction. Through the re-entering, researchers can ask not only what elements form pandemic communication, but also how these factors vary contingent on the communication context. Detecting emerging communication themes by exploring core distinctions underlying pandemic communication is also possible. In particular, spotting these distinctions by searching for counter-concepts of the major terms that frequently appear in the news media will reveal the hidden media framing in pandemic communication.

Second, by utilizing *observation analysis*, researchers can examine what reference points people use to describe their perceptions or experiences of a pandemic, what contexts affect their choices of reference points, and what consequences the selection of references have in thematizing the pandemic communication. In particular, the communication of the first-order observers (those who are affected by the pandemic) and that of the second-order observer (politicians and health decision-makers) can be compared in terms of their selections of communication scopes, information channels, thematizations, the level of message complexities in communication, etc.

Third, researchers can adopt *differentiation analysis* to detect how the communication themes and framings of pandemic descriptions, for instance, differ by functional subsystems such as economy, politics, law, education, religion, and mass media. Also, researchers can explore translation processes that facilitate communications between these different function systems to develop effective intervention messages.

Finally, researchers employing a *semantic analysis* can ask what semantics repeatedly appear in pandemic communication. Research can ask several questions. In the *temporal level*, which future risks have formed the communication themes in the present, and which past semantics have been re-entered in the current pandemic communication? In the *factual level*, which factual elements are highlighted to form pandemic communication, while other semantics remain ignored, and why? In the *social level*, how does the semantics of those who are affected and that of the decision-makers differ from each other? How do the risks attributed to self (or selves) differ from those to others, and what consequences of such attributions have for semantics?

To conclude, the current paper is dedicated to expanding Luhmannian research circles by providing practical and fruitful frameworks and by emphasizing their analytical gains. These theory-driven analytical frameworks are expected to provide valuable heuristic resources for those who seek to improve the consistency between theoretical constructs and methodological observations, either conceptual or empirical, thereby enriching the communication research field. In turn, more empirical applications of these frameworks will contribute to Luhmann's systems theory itself by bringing in rich insights.

Conflict of interests

The author declares no conflict of interests.

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Vertical and horizontal communication on the Facebook pages of 2014 Brazilian presidential candidates

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Abstract

Social networking sites can be defined as online services that allow users to create public or private profiles and, among other things, create connections, share opinions, news, and affections. In 2014, many electors in Brazil were engaged in the presidential campaign on these virtual spaces as never before. In this context, the research question guiding this study is: What are the communication strategies employed by electors and the three main presidential candidates in the online interaction processes during the 2014 Brazilian elections? To address this question, empirical research was employed using a qualitative approach to analyze comments posted in the candidates' Facebook fan pages during that electoral process. Based on the research and theory in this field, two types of communication in the virtual space were investigated: (a) vertical communication through interaction between Internet users and campaign staff; and (b) horizontal communication among electors in the comments section. We conclude that, although the comments section of the candidates' pages on Facebook is frequently used as a space both for mutual support and incivility against opponents, it is still used creatively for discussion on the candidates' government plans, the situation of the country, attempts of engagement in the electoral process and exposure to ideologically crosscutting viewpoints.

Keywords

Brazil, online interaction, political participation, presidential campaign, social media, vertical and horizontal communication

1 Introduction

The forms and extent of political participation in democratic elections using new electronic and social media are a core focus of research for many scholars from different countries (Bernhard, 2018; Bimber & Davis, 2003; Erikson, 2008; Nielsen, 2011; Stier, Bleier, Lietz, & Strohmaier, 2018; Stromer-Galley, 2000; Vitak et al., 2011). In the past decade, several election campaigns and other political events took place in many countries. These include: presidential elections in Austria and the USA; legislative elections in Spain, Australia, and Russia; the impeachment of Brazil's president and the Brexit referendum campaign in the UK in 2016; presidential elections in France and UK in 2017; and legislative elections in the Netherlands

and Japan. These political events and election campaigns employed new forms of political engagement using electronic media, including some misleading campaign information, and showed the importance of interactions between different actors in the election process.

To investigate the forms and modalities of online interaction processes during an election campaign in more depth, the federal election in Brazil in 2014 was chosen for examination in this paper. This is a useful example for many reasons: First, the presidential election in Brazil had a high turn-out in 2014, which demonstrated the strong interest of the Brazilian population in greater political participation. Second, Brazil is the largest national economy, population, and territory in Latin America. Finally, from that election, "the internet



and social networks have become instrumental in spreading information about candidates, following news and debates and tracking issues ranging from corruption to pension reform” (Arnaudo, 2017, p. 5). For this reason, the relatively young Brazilian democracy offers a critical case to examine the use of social media for political participation.

The 2014 Brazilian presidential election cycle also represented a milestone in Brazil. It was the most competitive campaign in the country and presented intense debates on electronic networks and the streets (Barifouse, 2014). Three candidates dominated the contest: Dilma Rousseff (Workers’ Party – PT), Aécio Neves (Brazilian Social Democracy Party – PSDB), and Marina Silva (Brazilian Socialist Party – PSB). The first round of elections took place on October 5, 2014. In this round Rousseff received 42% of the votes, Neves 34%, and Silva 21%. None of the candidates obtained over 50% of the valid votes, and so the second round of voting was held on October 26, 2014. In this round, Dilma Rousseff was re-elected with 52% of the votes, against 48% of the votes for Aécio Neves. The polarization shown in this result was not over with the end of the election. After the dispute, in 2015 groups opposed to Dilma Rousseff and the Workers’ Party organized the biggest street protests in Brazil’s recent history and made dozens of impeachment requests. One of these requests was accepted by the Congress and Senate in 2016. Thus, Brazil reached the 2018 election even more polarized and enshrined the extreme right-wing politician, Jair Bolsonaro, as new president. Therefore, observing the interaction processes evidenced in the 2014 presidential campaign remains relevant, even after the 2018 election, considering all the developments that this fierce election provoked.

A study on the use of information and communication technologies in Brazil developed by the Brazilian Internet Steering Committee, shows that, in 2014, half (50%) of Brazilian households had Internet access, which represents a growth of twenty-three percentage points compared to 2010 (Bra-

zilian Internet Steering Committee, 2014, p. 176). In the same period (2010–2014) the number of subscribers to Brazilian Facebook grew from 6 to 89 million (Barifouse, 2014). Thus, there was a much larger proportion of the population using the leading social media platform in the 2014 elections than in previous elections.

The rapid growth of the number of Internet users stimulated the expansion of interaction processes between electors and the candidates’ campaign staff, mainly on social media platforms such as Facebook. Social networking sites are defined here as online services that allow users to create public or private profiles and navigate to other user profiles (Harlow, 2013). Using social media, people can, among other things, create connections with each other and share opinions, news, and affections. In 2014, in these virtual spaces, many electors in Brazil were engaged in this campaign for three months as never before (Barifouse, 2014). Investigating the online interaction processes between electors and candidates’ campaign staffs, specifically, interactions that took place in the Brazilian presidential campaign via Facebook pages, will assist in further developing models that can be used to analyze political uses of social media.

Many studies have been undertaken to understand the conduct and dynamics of political campaigns using the Internet (Bernhard, 2018; Bimber & Davis, 2003; Segard & Nielsen, 2013; Stier et al., 2018; Stromer-Galley, 2000; Vitak et al., 2011). The emphasis of these studies is most often the analysis of how social media, websites, and virtual tools have been used by the politicians and campaigns in the electoral period. Differently, the contribution of our research is to focus on what the *electors* do in these campaigns. Thus, our main attention is focused on understanding how the electors try to contribute through social media to build a good image for the politicians they choose to support.

There is a common view that people do not use the Internet properly to become engaged in electoral campaigns or political conversations. Stromer-Galley and Wichowski (2011) comment that, in-

stead of reasonably argued positions, we observe aggression, irrational discourses, and argumentative poverty in Internet posts. However, “although the discussion may be uncivil and ideological, people still engage in it, it still matters to people who want to engage in political discussion” (Stromer-Galley, 2000, p. 114). Thus, electors’ engagement in political events matters. Their discussions about what government policies would be better for the country and their positioning as agents of discourse in the democratic process should be investigated, even if this participation is accompanied by uncivil and impolite postings.

The research question guiding this study is: What are the communication strategies employed by the participants (electors and candidate’s campaign staff) in the online interaction processes during elections? We investigate the interaction processes that took place in the Facebook pages of the three main candidates in the 2014 Brazilian presidential election to explore this question. Based on the research and theory in this field, two types of communication in the virtual space were investigated: (a) vertical communication through interaction between Internet users and campaign staff; and (b) horizontal communication among electors in the comments section. Through exploratory abductive research (Dubois & Gadde, 2002), we aim to develop an observation-based typology of vertical and horizontal social media interactions that can be applied by future research.

2 Literature review

According to Bourne (2010), political participation can be understood as a broad concept since it can include different forms of activities. The broadness of the concept engenders difficulties in its definition (van Deth, 2014). But, if we consider the purpose underlying political participation, it can be defined as an activity aimed at the impact on political authority.

The development of information technologies has extended opportunities for

participation in political decision-making processes (Bernhard, 2018). The Internet and social media allow participants to influence the activities of political authorities through online communication. The dramatic growth in online political discussions has occurred during the last twenty years. In this period, the use of online technologies has transformed one-way political communication into multimodal interaction (Tromble, 2018).

But observation of the latest political discussions online shows that most conversations are led without regard to the interlocutor. Some authors raise the question of practices of politeness and civility in online interaction and their impact on the quality of political discussion (Papacharissi, 2004); others, argue that social media are creating “echo chambers” where “citizens need not engage with those who make sense of politics in different ways” (Hinck, 2018, p. 215). Furthermore, anonymity and freedom on the Internet can lead to aggression, rudeness, and unwillingness of participants to listen to each other. Political discussions can transform into flaming or trolling and finally become an exchange of insults. This raises the question among some scholars: Is high-quality online interaction possible and can it facilitate democracy?

This type of questioning is carried out by scholars who work based on deliberative criteria to understand what results may come from these conversations and whether they follow minimum principles of reciprocity, reflexivity, mutual respect, rational consideration of points of view, explanation, and review of arguments, etc. Therefore, Marques and Martino (2016, p. 119) argue that “a deliberative framework of political conversations can lead to unrealistic expectations about how the conversation works.” For that reason, “the analytical focus of the conversations can be more interesting if it seeks to reveal how conflicts, dissent, and disagreements are worked on in the interaction.”

Based on that premise, we seek to contribute to studies on political participation with an analytical focus seeking to understand how interaction processes

take place on candidates' Facebook pages, without making value judgments about the analyzed political conversations. This approach considers also how the affordances, architecture, and rules of this social networking site interfere with the interaction processes studied here.

To address the research objectives, we observed the interaction processes developed by electors and the candidate's campaign staff on Facebook, mainly in postings in the comments section. According to Stromer-Galley (2000, p. 114), there are two ways in which the Internet can improve democracy: "by promoting an increase in horizontal communication among people and an increase in vertical communication between people and political elites." While we do not know if this increase in online communication can improve democracy, following the purpose of this study, we tried to understand the characteristics of these processes in the Brazilian electoral context.

3 Vertical and horizontal communication in political campaigns

Depending on the direction of communication flow, two types of online interaction can be identified: horizontal communication between actors at the same level (e.g., electors) and vertical communication between communicators having not equal positions (e.g., electors, journalists, politicians).

Horizontal communication is considered in contemporary studies from different points of view. Some scholars understand it as online-talk among the groups of citizens trying to improve public policy in their countries (Constanza-Chock, 2006; Sørensen, 2016). They use social media (mostly Facebook and Twitter) as tools to communicate with each other. Although some scholars warn about a hazard of miscommunication or unproductive interaction between citizens through digital platforms (Dishon & Ben-Porath, 2018), the phenomenon of using social networks for political conversations has made re-

searchers argue that these platforms enable the formation of a new public sphere (Segaard & Nielsen, 2013). In this sense, we agree with van Dijck (2012, p. 162), that "there is less need for articulating a 'new' sphere or spherical concept but more need for theorizing how this communicative space [Facebook, the authors] is contested by public, private, state, and corporate actors fighting to dominate the rules for social interaction." Moreover, "what is important to understand about social network sites is how they activate relational impulses, which are in turn input for algorithmically configured connections – relationships wrapped in code – generating a kind of engineered sociality" (van Dijck, 2012, pp. 161–162). Therefore, we examine here how the specificities of the platform (Facebook), where interactions take place, shape such interaction processes. Considering that, different from the "electronic brochures" of websites (Stromer-Galley, 2000), current campaigns should internalize a whole set of platform-specific features on social media to engage with electors (Stier et al., 2018). We consider also that there is a possibility of creative appropriation of the functionalities of social media (Marques & Martino, 2016, p. 119), both in horizontal and vertical communication strategies.

Vertical communication, or communication between citizens and politicians, enables people to react to political elites' actions and inform them about their thoughts and wishes. In other words, it facilitates participation in the decision-making process. Although the Internet provides a great number of opportunities to communicate online, many writers find this kind of interaction doubtful. Stromer-Galley (2000) analyzed the results of studies exploring opportunities for political engagement offered by candidates' websites during the election campaigns. According to her research, only a few websites were interactive and provided feedback opportunities. She also points out that candidates tend to avoid interactions with electors for three main reasons: 1) the high costs of maintaining these channels and uncertainty about whether

they are decisive for the electoral result; 2) the possibility of losing control of the communication flow; 3) the possible loss of ambiguity regarding the candidate's position on controversial topics. Therefore, Stromer-Galley (2000) refers to online interaction between politicians and citizens as a simulacrum of democracy that seduces individuals with mere appearances of communication and collectivity, while isolating them. Later studies investigating online political conversation confirmed this conclusion (Nielsen, 2011; Stromer-Galley & Wichowski, 2011; Sweetser & Weaver Lariscy, 2008). That was the state of the art ten years ago.

More recent studies show that politicians do not avoid interaction (Ceron, 2017), but prefer top-down communication. Possibly, it has not changed so much. According to Tromble (2018), most of politicians' social media activities take the form of one-way communication. Recent studies identify various factors influencing online interaction between politicians and the public: type of platform (Nelimarkka, Laaksonen, Tuokko, & Valkonen, 2020), citizen demand (Tromble, 2018) and the platform's architecture (Bossetta, 2018; Stier et al., 2018).

4 Methods

Following the purpose of this research, we used a qualitative approach to analyze comments posted on the candidates' Facebook pages during the 2014 electoral process. The official Facebook pages of the three main presidential candidates were scrutinized by the first author – to carry out an “extensive and detailed analysis of the traits that characterize the case”, e.g., the signs, which would be “the perceptible elements of the case to be studied” (Braga, 2008, p. 79). Thus, abductive approach was carried out to systematize our observations and formulate the evidence-based research case (Dubois & Gadde, 2002). Abductive reasoning implies an intertwining relation between theoretical analysis and empirical observation. Different from deductive or inductive approaches, abductive pro-

cess takes place through a “‘back and forth’ [movement, the authors] from one type of research activity to another” (Dubois & Gadde, 2002, p. 555). Theory is actioned to analyze empirical data, while observations bring insights to rethink the theoretical framework in a process of mutual tension. It is important to note also that the collection of data and many of the reflections exposed here are the results of an empirical research carried out by the first author for her doctoral thesis (Maia, 2019).

The election campaign began on July 6, 2014, and initially included three main candidates: Dilma Rousseff (PT), Aécio Neves (PSDB), and Eduardo Campos (PSB). However, after the death of Campos in a plane crash on August 13, the Brazilian Socialist Party chose Marina Silva, his vice president candidate until that moment, to participate in the presidential elections. According to the pre-election polls, she moved to the front line along with the other two candidates. Therefore, the collection of empirical data for this research covers the period from August 20 to October 26, 2014 – the date when Silva got involved in the election until the second-round vote that marked the end of the elections.

Considering that this period was marked by the intense circulation of the content on the observed pages, we deem it pertinent to state the main candidate posts and their respective comments (29 posts on the page of Neves, 29 posts on the page of Rousseff and 20 posts on the page of Silva – totaling 78 posts, for a detailed overview see the Online Supplement). These represent the most relevant moments of this presidential campaign. The relevance was measured mainly based on the intensity of interactions that these posts generated. Television debates, for example, had immense repercussions on Facebook, generating hundreds of comments on the observed pages. We restricted our observations to the first 50 comments of each post (totaling 3900, collected from the 78 analyzed posts), sorted by relevance. The redundancy of the content in these first 50 comments justifies not extending the analysis into the quantitative collec-

tion since our objective is to understand the diversity of comments, more than the relative proportions. The first fifty comments on each post are enough for the analysis proposed here because, apart from being the first ones posted, which facilitated their collection, they were also the comments that received more “likes” and “comments-reply” from users of the site. This shows that this selection of comments reflects the thoughts and ideas of participants.

After the collection and storage of the posts and their respective comments in text documents, the first author of this study enumerated these comments and moved on to the analysis of the communicative strategies and interactive processes carried out by the participants of those pages (electors / campaign teams). To analyze these empirical data, the ethnomethodological discourse analysis approach was chosen as a research method. Ethnomethodology was established by Harold Garfinkel in the 1960s (Moore, 2013). It is not a method itself, but, as Garfinkel puts it in a discussion with other scholars, “it is an organizational study of a member’s knowledge of his ordinary affairs, of his own organized enterprises, where that knowledge is treated by us as part of the same setting that it also makes orderable” (Hill & Crittenden, 1968, p. 10). In this sense, Rodrigues and Braga (2014) emphasize the analytical potential of the “ethnomethodological approach of discourse” for the explanation of the phenomena of discursive exchange, not only in face-to-face contexts but also on the Internet. The authors further explain that while a conventional discourse analysis takes an approach to discursive interactions as something complementary to the meaning of what is said, an ethnomethodological posture, in turn, considers that the meaning of what people say is closely related to the interactional context in which their talks took place. In our case, what matters is not just a study of power strategy engendered by candidates to persuade electors on Facebook, but mainly, what the participants do together, the interaction processes developed by them on these pages.

5 Results

In order to explain the interaction processes observed in the analysis, a model was developed through which we categorized the interactions into two major types: vertical communication and horizontal communication. Based on the conceptualization proposed by Stromer-Galley (2000) for the communication in these two dimensions, it will explain, on the one hand, what happens when the elector writes in the candidates’ posts and when the campaign staff responds to these comments; and, on the other hand, what happens when electors interact with each other. At the end of this analysis, a table of this typology will be presented as a tool for summarizing observations.

5.1 Vertical communication

We identified some patterns in the communication between electors and the candidate’s campaign staff. These patterns were organized into categories that will be explained and exemplified below. Since there is some reciprocity between what the electors comment on and what the candidates respond to, the interactions between these two poles will be analyzed together.

5.1.1 *Elector’s compliments and candidate’s acknowledgments*

One of the most common types of comments posted by the electors on the candidates’ pages is one in which they make compliments to the candidates regarding their personality, government plan, or performance on the debates and campaign in general. In these comments they say such things as: “Congratulations, you are doing great!”, regarding the candidate’s performance during the debate. This type of message was answered with acknowledgments from the candidates. Also, it is important to highlight that only two candidates (Neves and Silva) usually answered the electors’ comments. Rousseff’s campaign staff rarely responded to comments. As most of the comments addressed to Rousseff remained unanswered, it seems like the electors were just talking among themselves.

On the other hand, the question is not only whether participants were interacting with the candidates (actually with their team) or not. An important aspect of this case study is that electors were being invited to speak not just to the candidate but also to the “third group” – “them.” This group (“them”) consists of at least three types of people: silent participants (undecided electors), the peers, and electors who choose opposing candidates. Another possibility is that some campaign teams have infiltrated the debates in a disguised way, through false profiles that simulate the behavior of the common user to create discussions that can favor or attack certain candidates, with an appearance of popular opinion (Kovic, Rauchfleisch, Sele, & Caspar, 2018; Maia, 2019). This does not compromise our analysis because the idea is to understand how electors and campaign teams develop communication strategies together with the objective of winning the elections.

5.1.2 *Electors' criticism against opposing candidates*

Another common type of comment is one in which the electors strongly criticize the opposing candidates, mostly regarding their personality, their party, or their government plan. This type of comment is responded to with a concordance comment from the candidate's campaign staff. They usually agree with their candidate's positive qualities or the opponents' mistakes, even when the elector's speech is prejudiced against minorities.

In a video where Neves speaks about denunciations of corruption in Petrobras (a semi-public Brazilian multinational petroleum corporation) during Rousseff's presidency, e. g., an elector comments that Neves is the only one whom she trusts and affirms that Brazilians need men and not women to govern the country: “It has already been proved that a woman as a president in Brazil does not work” (Regina, 2014).¹ This statement was supported by

more than a hundred Internet users who liked the comment. As mentioned before, Stromer-Galley (2000) says that loss of control is one of the common concerns shared by candidates regarding maintaining a comment section on their website. More skeptical electors may feel that the candidate shares the same ideas expressed in inappropriate messages posted by some extremist electors. However, in this case, the candidate's campaign staff took the risk and answered this statement, saying that “there is no more space for the amateurism of the current government,” which was represented by president Rousseff at that period. This corroborates the statement of Stier et al. (2018) that the current online campaigns are micro-targeted, that is, they adapt their messages to specific audiences and act according to the logic of each social media platform. In this case, Neves operates according to Facebook's logic of “making friends,” by agreeing with the comments of his electors to create ties with them.

Later, some women criticized this comment accusing it of sexism, but they were labeled as “petistas” (militants of the opposition party). Thus, the conversation did not develop. Making the author of divergent comments an enemy to be fought is one of the main strategies used by many commentators to avoid the need to present arguments to develop the debate. If the “others” are “our” enemy, they must be rejected, no matter what they say.

5.1.3 *Questions and answers on policy plans*

Among all the analyzed elector postings, those who used the comments section most often to ask questions about the candidate's government plan were Silva's electors. This happened because the candidate changed her government plan 24 hours after launching it, claiming a procedural flaw in the editing of the document. The change took place in the points that contemplated the demands of the LGBT public before.² This led to many attacks

1 All the comments used in this paper were translated from Portuguese to English by the authors.

2 The change in the government plan was in relation to the statements that promised

by opponents, who accused her of having changed the government plan in the light of criticism from the religious point of view since the candidate is evangelical. Moreover, in the face of persistent attacks by opponents, especially Rousseff, certain promises of Silva's campaign led to many doubts among electors. Thus, it was common for the electors to explore the candidate's social media platform to understand her positions on some issues. The team, at a certain point in the dispute, presented long answers with explanations about the candidate's government plan in the space provided for comments. But in general, both her and Neves' team regularly submitted short responses, followed by links to the campaign website. This shows the perception, among these campaign teams, that Facebook would be a space for ephemeral interactions, engagement, and participation, while the websites would be spaces of abundance of information (Maia, 2019).

5.1.4 *Candidates asking for support*

This category represents the comments in which electors offer help to the candidate's campaign or advice about the government plan, and the candidates ask for support of the campaign. Neves' electors, for example, tried to advise the candidate, mostly regarding what kind of performance and speech he should adopt during the campaign. One of them said, for example: "Ok Aécio [Neves], the upper and upper-middle class have already understood your political platform, and most of them have already decided to vote for you. How about start talking to the poor people using an accessible language for the masses?" (S. Lima, 2014).

Silva's electors, in turn, indicated what they were doing to contribute to the candidate's campaign: "I made myself stickers to put them on my family's vehicles" (Reis, 2014). Other electors summoned their peers to go to Rousseff's page to respond

the accusations her electors made against Silva: "we sincerely need to fight back on the Workers' Party Facebook page" (David, 2014). To this type of comment, the candidate's team responded with messages that had an imperative tone, propagandistic rather than dialogical ("Follow @Marina_Silva," "Join us," "Participate"). On Facebook, the campaign staff can answer each person in a way that the response could reach everybody in general. Silva's team addressed the electors by name and at the same time took advantage of the medium's features, which allow a response addressed to one to become visible to all. So, the request for support to an elector could be extended to everyone.

Rousseff's electors produced some content to share on social media, driven by the intention to contribute to the candidate's campaign and responding to her team's call to post positive content for her. They published their life stories and personal memories, intertwined with previous and later political environments to the governments of Lula da Silva, Rousseff's predecessor, and Rousseff herself, to argue that their lives changed due to the social programs created by the Workers' Party. Thus, they presented rational and emotional arguments for the candidate's choice. They also shared texts, videos of mobilizations, songs, drawings, and all types of productions in favor of the candidate. Some of these amateur productions became part of the candidate's timeline on Facebook – thanks to the strategy of using the hashtag #FaceDaDilma, which allowed the posts made on supporters' timelines to be found and shared by this candidate's campaign team. In one of these posts, reproduced below, the elector posted a selfie holding his diploma and wearing his university uniform. He told his life story in order to demonstrate concretely how the social programs developed by the Workers' Party had transformed his life and that of his family.

1) support for the criminalization of homophobia and 2) the adoption of children by same-sex couples. After the change, the first promise was removed and the second toned down.

My family initially received Bolsa Família,³ as 80% of the families in my municipality did.

3 The Programa Bolsa Família (PBF) is a gov-

Thanks to PRONAF [National Program for Strengthening Family Farming, the authors] credit lines, we got a better income and left the program. I went to study high school at a federal institute ... together with my older brother. At that time, my sister got a partial scholarship. Then, my brother and I got places at federal universities ... During these four years we lived on assistance grants (housing, food) and research grants. Nowadays, I have my diploma in my hand, and my brother is about to graduate. My other sister is taking a course through PRONATEC [National Program for Access to Technical Education and Employment, the authors]. We struggled a lot to “win in life,” we are the first generation in the family with higher education, our parents haven’t even finished elementary school. But if it weren’t for the opportunities created in the last decade, we would most likely not be where we are. (Oliveira, 2014)

5.1.5 *Criticism and defense of candidate’s performance in debates*

Each group of electors supporting the three main presidential candidates also endeavored to provide a kind of advice to them. Whenever the politician participated in a televised debate, for example, the commentators carried out analysis of the events to suggest what kind of behavior, subjects and approaches the candidate should adopt.

In these comments, electors discussed the position the candidate should have to face the opponents: “[Y]ou have to attack more and be more incisive” (Bandeira, 2014). From what appears to be an analysis of the circumstances of the dispute, an elector still warns: “[E]ither you [Neves] at-

tack the candidates with ideas and facts or we will lose the election” (Bandeira, 2014). Neves’ team, in turn, opted for an automated response, only thanking the elector for their suggestion.

In one of Silva’s posts, the electors also suggested what kind of performance the candidate should have to face her opponents, and what kind of discourse she should use with the electors. They suggest that she should change her posture, which, in their opinion, demonstrated passivity and uncertainty. Some of them seem to have incorporated the imaginary that a political debate would be a kind of fighting ring, in which candidates must attack opponents. The marks of this vision are discernible in some words contained in one comment addressed to her post: “go to them,” “you did not attack,” “just agreed,” “defense is (...) attack,” “react” (Torres, 2014). The team responded to them with the irreducible defense of the candidate’s policy-making way: “based on proposals, not on attacks. In a debate, not in a clash” (Silva, 2014). The other commentators who got into the conversation, continued adopting the position of “political consultants,” analyzing the behavior of the candidate and suggesting how to continue the campaign.

5.2 Horizontal communication

In all the analyzed posts, the communication did not end with the candidate’s response. Many other commentators got into the debate, disagreeing or agreeing with the initial comment, and others diverging completely from the subject that started the debate. This change of subject in the comments section is a symptom that the discourse does not circulate linearly. Thus, these horizontal communications are characterized by strong indeterminacy, the interaction is not typically point-to-point, but rather a diffuse interactivity (Braga, 2006). It is important to note that the architecture of Facebook supports this so that the comment space works in this diffuse and chaotic way. Besides, the ranking made by the website for the display of comments ends up favoring those more emotional and less rational, since they were the ones that received

ernment program introduced in 2003 by the then-president, Lula da Silva, a member of the Workers’ Party. “Under PBF, low-income families receive cash transfers on the condition that, for example, they send their children to school and ensure they are properly vaccinated. The conditional cash transfer model successfully reduced levels of inequality and hunger – with significantly fewer people living below the poverty line – and closing the historical rural-urban gap” (Center for Public Impact, 2019).

the most likes and responses (Zerback & Wirz, 2021). Thus, the most controversial comments gained greater attention from users and, therefore, were ranked better by the algorithm. This ended up giving greater visibility to these messages – in a cycle that feeds back. This section will explain the categories listed as horizontal communication and explore the peculiarities of these diffuse interactions developed by citizens when they discuss politics on platforms such as Facebook.

5.2.1 *Discussing policy plans*

Silva's electors are those who used the comment section most often to discuss the candidate's campaign plans. This seems to happen partly because, as mentioned, this candidate made changes in her government plan. Neves' electors sometimes asked what he would do for a different group of citizens. These issues were often not answered by the candidate, so the electors themselves tried to give vague answers to the questions, or pointed out possible paths that the candidate should adopt to solve the demands of different groups of electors. Rousseff's electors, in turn, talked mainly about the social programs implemented by the Workers' Party and argued that the best thing for the country would be the continuation of the government program adopted by her. Silva's and Neves' electors also criticized Rousseff's social programs, especially *Bolsa Família* [a social welfare program, the authors], and they split off into arguments about whether the program should continue.

5.2.2 *Discussing candidates' personality*

Both the electors for a candidate and the electors for opponents tried to create categorizations for the presidential candidates. Rousseff's electors, for instance, report her to be a mother, they usually called her "Dilmãe" (a word that they created from the junction of Dilma plus mother). The opponent's electors, in turn, accused her of being "a thief, a corrupt ... a terrorist" (Alves, 2014). This comment was posted in response to another that pointed out Neves' lack of elegance against Rousseff during a presidential debate (Rodrigues,

2014). Thus, her electors accused the opposing candidate and his electors of being aggressive and disrespectful.

To Silva's electors, she was a savior. To some of them, a strong woman. To others, she was too delicate and uncombative, as mentioned in sub-chapter 5.1.5. For example, an elector says: "When you [Silva] speak slowly, you show insecurity about what you are talking about, as if you don't know about the subject" (Torres, 2014). Some agree with this criticism, while others disagree, arguing that the candidate's more peaceful tone demonstrated that she was "different, even in the way she spoke and expressed herself" (Sscpam, 2014), which would be something positive for them. For those that did not choose her, she was indecisive, a puppet of the bankers, in the opinion of Rousseff's electors. In a post in which Silva alleged that her proposal of autonomy of the Central Bank consisted of preventing any party or group of interest from using that institution to benefit themselves, an elector opposed to the candidate, questioning: "No bank, Marina? Not even Itaú, a bank which your campaign advisor is heiress? It makes me laugh" (Leal, 2014). Faced with this type of criticism, other electors defended Silva claiming that: "Yes, the coordinator of the Government Program is one of the heirs of Banco Itaú, but what links her to Marina is education. Fruit of her career as an educator and funder of social and sustainability projects" (Feitosa, 2014). In another post, in which the candidate claimed to never have mixed religion and politics, a critic pointed out that "a tweet by Malafaia [evangelical pastor, the authors] was enough for her to change her government plan" (Lucas, 2014). That post was answered by one of her supporters, who stated:

Marina did not submit to Silas Malafaia, nor did she retreat from her positions, which have been the same since 2010: equal rights between homo-affective and hetero-affective regarding civil union, with sharing of health insurance, sharing of assets and the right to adoption. She just doesn't use the word "marriage" to avoid problems with an electorate of

tens of millions, many of whom would see it as a threat to religious practices. (Souza, 2014)

In the words of the Neves' electors, in turn, Silva was an auxiliary line of the Workers' Party. In one of the posts by Neves during the first round, for example, an elector asked him to show that Silva and Rousseff "are the same thing, the result of the same ideology" (Riera, 2014). He, in turn, was a hero for his electors. One of them, for example, pointed out that Neves was her hope to "save Brazil from the clutches of *petralhas* [members of the Workers' Party, the authors], the mafia, the criminal organization, the terrorists, the communists" (Regina, 2014). Another elector responded to that comment asking: "And would Aécio be our Savior??? I don't doubt what PT is capable of... but believing that Aécio would do it differently makes me want to laugh out loud! Good luck Brazil" (Kowaltchuk, 2014). Faced with that question, an elector from Neves replied:

Aécio may not be the savior of the homeland because [such thing, the authors] doesn't exist! But he is the most prepared [candidate, the authors] to govern the country right now! He is the only candidate who has concrete plans to fight violence, corruption, to improve Brazil's image internationally! (Nunes, 2014)

Nevertheless, for those who chose other candidates, Neves represented the rich people and was not concerned about the needs of the socially marginalized groups.

5.2.3 (Not) Discussing the country's situation in general

Rousseff's electors argued that the country had improved a lot when the presidency of the republic was under Workers' Party control and that betting on another government, represented by Neves or Silva, would put all these improvements at risk. Meanwhile, electors of both contenders to Rousseff argued that corruption, supposedly preponderant in the Workers' Party, was driving the country into chaos and only the candidates they chose could change the direction of the nation. When they talked to each other they agreed on

these arguments. When they talked to electors that chose opposing candidates, they usually started by discussing the country, but soon they tried to use an ad hominem strategy (Schopenhauer, 2009) or sought other ways to not discuss the specific subject matter.

In a post in which the official page of Rousseff shares the testimony of an elector, for instance, an opponent elector tried to disqualify her electors, saying they were "the shame of this nation," (Rangel, 2014) and accused the Workers' Party of being corrupt. In response, an elector of Rousseff points out the denunciations that exist against the PSDB, the main opposition party to the Workers' Party. The strategy was: If the opponent elector speaks ill of whom I stand in favor, I will speak ill of whom he probably chooses. The next elector who got into the debate started to attack the sources used by the Internet user against Rousseff. In the latter two cases, neither of both electors attacked the arguments of the opposing commentary, and in all other comments that follow the same logic is observed. This approach is not necessarily exclusive to this group since this strategy could also be found in the comments of the pages of the three candidates in question. The fact is that, sometimes, the discussion of the country's situation is put aside in favor of the exchange of mutual accusations and attempts to disqualify the other.

5.2.4 Supporting themselves and insulting each other

A common strategy among all the electors is to say or share what they are doing to help the candidate they chose in order to incentivize their peers to do the same. A Neves' elector, for instance, posted:

Word of mouth works, folks! I printed material about Aécio's achievements and his biography. I started distributing yesterday. I spoke in the elevator to people I knew who were in doubt and, also, porters, taxi drivers and individuals who were in a print shop. Things seem to be going well. Social media isn't everything.

You need a little printed material and go by word of mouth. (Perfeito, 2014)

Faced with this discourse, several electors felt instigated to also contribute to the campaign and asked where they could get the material to distribute in their neighborhoods as well. The intention in sharing the experience of militancy in support of the candidacy is precisely this: to generate the contagion effect and make others feel impelled to contribute in some way to the campaign as well.

Silva's electors, in turn, shared some strategies to help the candidate's campaign: "We have to go on social networks to support Marina Silva, who is being slandered! Let's go to the Facebook pages of *Folha de São Paulo*, *Veja*, *O Globo*, *Estadão*, and others [journalism companies, the authors] with national repercussions!" (Hellen, 2014).

In addition, whenever any elector produced something (an artistic creation or a comment that substantiated the vote in question, for example) in favor of the campaign that united them, the other electors of that group tried to support and congratulate their peers, as happened when Rousseff's Facebook page shared a piece of art produced by an elector in favor to her and the other electors accomplished the creator of this artwork: "it's very beautiful, if I were Dilma Rousseff I would keep it as a souvenir" (Coutinho, 2014). This type of strategy denotes an effort to strengthen the ties among the members of the group, to make those who are part of it and collaborate with it feel important and valued in that group. On the other hand, the presence of electors who opted for presidential opponents on the official pages of the other candidates was strongly opposed by the group that chose that candidate. On the same Facebook page, an elector from Neves criticized the artwork of Rousseff's elector: "My God, what an ugly thing... I was even scared when I saw..." (Azevedo, 2014). This was answered by a Rousseff's elector request for him to leave that space, as if it belonged only to them. This is one of the characteristics of the formation of

an "us versus them" perspective in the analyzed pages.

5.2.5 "Us versus them"

Each group of electors acts in the sense of "demarkating" that place as its own to form bonds only with each other and with the candidate they have chosen for the presidency. The comments presented above, which refer to the artistic production of an elector in favor of the candidate Rousseff, demonstrate that electors understand the pages of their candidates as a space that belongs only to them. Therefore, they believe that opponents should withdraw from that space along with their arguments against the candidate who owns the page.

It is also common to try to create a characterization for that group of "us" regarding "them." As an example, we have this comment posted on Rousseff's Facebook page:

The difference between Dilma's electors [us, the authors] and Aécio's electors [them, the authors] is in argumentative capacity, we do not need to offend anyone, we defend our vote without denigrating the other. Respect for others, people. If you do not agree, go to the page of your candidate [and] manifest support, lowering the level of the debate this way, you will not get anything here. (M. Lima, 2014)

5.2.6 Justifying one's decision for a candidate and judging on other's decisions

The "we," implicit in the speech of Neves' electors, are those with reasoning ability, who have already opted for the candidate. The "them" would be "the poor people / the mass," as it can be observed in the comment posted by S. Lima (2014) and used as an example in chapter 5.1.4. On the other hand, the "we" of Rousseff would be "the people," and "them" would be "the elite." One of Rousseff's electors, for example, responded to a comment made by another elector, who informed how the Workers' Party's social programs had changed his life, with the following statement: "Con-

gratulations on the story Bruno, this is what they [the rich people, the authors] hate the most, people having more opportunities” (Mafra, 2014). The “us” of Silva, in turn, are those who want the “new” while “them” are those who chose more of the same: PT or PSDB. One of Silva’s electors argues, for example: “It is incredible and laughable the amount of abuse addressed to Marina by Workers’ Party and right-wing blogs’ supporters. [...] Should we comply with the corruption scandals of the PSDB [Neves’ party, the authors] and PT [Rousseff’s party, the authors]?” (Goldenstein, 2014). In establishing these divisions, prejudiced patterns were created to explain the motivations of each group of electors: Rousseff’s electors would be driven by ignorance and the need for welfare programs (such as Bolsa Família); Neves’ electors would be driven by hatred of the poor and the will to maintain class divisions; and those that chose Silva would be naive to believe that she would, on the one hand, govern for the poor Brazilians or, on the other hand, be different from the PT. In this sense, Slimovich (2012) explains that this type of posture is common among politicians because democratic disputes

demand the construction of an antagonistic element with which it cannot be reconciled. In the case analyzed here, electors see themselves as part of the campaigns, so they adopt the same kind of warlike behavior demonstrated by the majority of the candidates. They end up treating their compatriots as if they were enemies, just because they have different demands or ideology (Maia, 2019).

6 Discussion

To synthesize our findings, the two types of online interaction (vertical and horizontal) are organized in two tables, which articulate the communication processes developed by electors among themselves and with the candidate’s campaign staff.

In the first table, we consider the messages that were sent from electors to candidates that they apparently chose. We tried to create a correspondence between the messages posted by the electors and the responses sent by the candidate’s campaign staff. It should be noted that the comments directed against the candidate were never answered by the campaign

Table 1: Vertical communication

Electors to candidate	Candidate to electors
Compliments	Acknowledgments
Electors’ criticism against opposing candidates	Concordance (about their positive qualities or opponent’s mistakes)
Asking questions about policy plans	Explaining policy plans
Trying to help the candidate	Candidates asking for support
Criticizing candidate’s performance in debates	Defending themselves

Table 2: Horizontal communication

Electors to electors	Electors to electors of opponent candidates
Discuss policy plans	Discuss policy plans
Discuss candidates (personality)	Discuss candidates (personality)
a) Rousseff is like a mother	a) Rousseff is corrupt, a liar
b) Silva is a savior	b) Silva is someone indecisive, a puppet
c) Neves is a hero, the only hope for the country	c) Neves is a representative of the economic elites
(Not) Discussing the country’s situation in general	(Not) Discussing the country’s situation in general
Trying to support themselves	Insulting each other
“Us versus them” (friends and enemies)	Us versus them (friends and enemies)
Explaining and defending their reasons to choose that candidate	Judging on other’s decisions

staff. One explanation for this phenomenon of non-response to critics lies in Facebook's operating logic. If candidates respond to a comment directed against them, the comment will gain prominence, and then this negative message will be at the top of the comment display list for that post, which can be detrimental to the candidate – that is why they usually “preach to the converted” (Stier et al., 2018, p. 55). In this context, Marques and Martino (2016, p. 126) emphasize the importance of “considering the technical aspect and the interface design (discursive architecture) as one of those responsible for the architecture and the functioning of the debate.” Besides, Stromer-Galley (2000) points out that if, on the one hand, the coordination of the campaigns shows a constant effort to adapt to online platforms, on the other hand, campaigns also demonstrate a certain insecurity in losing control of the flow of information, and thus end up harming the candidate.

Maybe since they are aware of that, when an elector posts negative comments on a candidate's page he seems to direct his message to that candidate's electors, hoping to be answered by those electors rather than by the candidate's campaign staff. Thus, this strategy results, as a consequence, in a flow of horizontal communication between the electors supporting opposing candidates. It corresponds with Sørensen's (2016) explanation of how horizontal talk often begins. He concludes that conversations between citizens start after some of the political posts that the politicians do not re-enter (Sørensen, 2016).

It is also important to highlight that the undecided electors are a difficult category to analyze because they rarely declared themselves as undecided. Even in comments with questions addressed to the campaign staff in most cases, the electors say first: “I'll vote for you, but I need to ask (...).” So, in this case, undecided electors rarely made remarks that would allow an investigation of their behavior.

In a paper published in 2000, and used as a reference in this study, Stromer-Galley reported the results of her interviews with campaign teams and her analysis of

U.S. candidate websites in 1996 and 1998 to explain why these candidates avoided online interactions with citizens. The author glimpses the democratic possibilities arising from interactions between people and political elites: “An interactive forum such as public bulletin board could create an environment in which people would ask specific questions to the candidate or make comments criticizing a position or action” (2000, p. 125). However, she also elucidates that having interactive forums can represent a risk to the candidates because if they give too many details about their plan, they may lose the ambiguity necessary to win the election. So, for instance, it was important for Silva to keep the vote of the evangelical group and, at the same time, to ensure the LGBT public that she would support their demands. Still, answering these questions and giving details regarding her government plan seemed to be a risk worth taking. This use of the candidate's Facebook page as a space to address questions about her government plan illustrates some positive role for online political communication, such as providing new information (Bernhard, 2018; Segard & Nielsen, 2013) and involving new people in the electoral process (Sørensen, 2016).

Since the electors believe that their candidates could solve the country's problems, they engage in activities online and in person. It seems that they feel co-responsible for the success of the campaign. In addition, they seem to know that they were not talking with the candidate, but about them, since all the answers were posted by the candidate's campaign staff. This was clear by the assigned messages that ended with the hashtag #team of Dilma or Aécio or Marina. However, the electors still acted as they were talking with the candidate, with a friend. It is worth remembering that maintaining friendship bonds is one of the premises of Facebook, a social network that exists due to the act of “adding” friends (through profiles) and interacting with them (Stier et al., 2018).

To create a sense of closeness to the elector, candidates used colloquial politics and expressed themselves through home-

made videos. Through the analysis, it was possible to observe that the campaign teams were more focused on influencing electors to act as volunteers than on discussing the social and economic problems to be faced. Electors, in turn, in many situations, addressed politicians as if addressing a friend: giving advice on how the candidate should act or speak, asking questions, praising, criticizing, making suggestions, etc. This contradicts the assumptions of Erikson (2008, p. 4) to whom “politics is not a location of friendship; rather, it is a location of debate, argument, representation, and legislation. While friendship is traditionally a function of the private sphere, politics are a function of the public sphere.” Nevertheless, it is worth mentioning the reflections proposed by van Dijck (2012), who considers that social networks not only cause transformations in the public, private and corporate spheres but, above all, operate a complex interpenetration of spheres, which typifies our contemporary culture. Therefore, it is understandable that these electors did not perceive distinctions between acting as friends of peers or as friends of the candidate / campaign team. As the interactional exchanges take place in the same space, reserved for comments, these hierarchies end up being left aside – horizontal and vertical communication develop there simultaneously. In the case of Rousseff, however, there was no such exchange between staff and electors in the comments. While not responding frequently to electors, the campaign team developed other interactive strategies, such as sharing the creations and testimonies of electors. This demonstrates the creative use of social media by the campaign of this candidate since the exhibition of content produced by amateurs together with that produced by specialists was something unusual until that moment in the Brazilian presidential elections.

On the other hand, responsiveness is certainly something that seems to be a concern among the electors. Most of the citizens who expressed their thoughts on the candidate’s Facebook page also demanded communication with their lead-

ers after the election period. One of Neves’ electors, for instance, says: “Aécio, continue communicating with us through social media after you became president!!!” (Schelb, 2014). In any case, the candidates analyzed did not completely avoid interaction and there was responsiveness in all the pages observed since the unanswered comments by campaign teams lead to conversations between electors.

In these conversations, the analyzed electors employed the following communication strategies: the personal attack on the person who wrote the comment or on the candidate considered as an enemy; the attack on the sources presented by the opponent; and the focus on only one point of everything that was stated by the other. When this last strategy was used, the initial theme of the conversation shifted to several other subjects, as each commentator “entered” the discussion and highlighted a single point in any of the messages written before his. What resulted in the absence of continued interaction, in a fragmentation of the speeches and themes – which overlapped each other and spread. In this context, discussions lose focus as soon as they start.

Stromer-Galley (2000, p. 116) argues that “similar to civic network researchers, I hold optimism that the Internet can offer a public space for rational-critical debate outside or alongside consumer society.” The observed political conversations among electors are not just a “rational-critical debate,” but a mix of mutual support, disrespect, incivility, the exchange of insults and accusations. Sometimes we could observe fandom behavior (Erikson, 2008), or in short, the effort to support or damage not only the image of the candidate of their preferences or dislikes, but also the group of like-minded, or electors who made a different choice, respectively. In this kind of context, instead of constituting an “interactive forum,” as predicted by Stromer-Galley (2000), an increased reliance on social media may create “closed systems of meaning-making and interaction resembling echo chambers” (Hinck, 2018, p. 215). This is a consequence of the algorithmic configurations of social net-

working sites that tend to generate a personalized information universe for each user, through the repetition of more and more of the same type of content already consumed (Pariser, 2011).

However, it is worth noting that even if the algorithm shows only content which users have previously interacted with, they still have the possibility of accessing new content and pages from people they do not “like” or “follow.” Our analysis showed that there is in fact interaction among the three groups of electors. Even if this conversation is carried out through exchange of insults and incivility, there is still exposure to ideologically crosscutting viewpoints.

In this sense, research conducted by Cardenal, Aguilar-Paredes, Cristancho and Majó-Vázquez (2019), Flaxman, Goel and Rao (2016) as well as Bakshy, Messing and Adamic (2015) corroborate the need for a more critical view on echo chambers and filter bubbles interpretation. A study on online political information consumption in Spain has shown that, although users spend more time on consuming content they agree with, they generally “engage in considerable cross-partisan media exposure” (Cardenal et al., 2019, p. 360). A research conducted by Bakshy et al. (2015, p. 1130) “examined how 10.1 million U.S. Facebook users interact with socially shared news” and showed that “compared with algorithmic ranking, individuals’ choices played a stronger role in limiting exposure to cross-cutting content.” They also pointed out that “social media expose individuals to at least some ideologically crosscutting viewpoints” (Bakshy et al., 2015, p. 1131–1132), even though the quality of these interactions may be questionable. Like those authors, our interest was to analyze the phenomenon in its specificities, without making a judgment on the normative value of political crosscutting exposure.

7 Conclusions

Even though the comments section is used by electors to publish messages of encouragement and compliments to the

candidates or offenses to the opponents, it is still important to analyze that material because electors also pose questions, discuss the country’s situation, and try to get involved in the electoral process. Through the examination of the comments section of the three pages analyzed, we could observe that some electors occupied the comment session to engage in discursive exchanges involving micro-arguments, life testimonies, and different points of view. Despite the fandom behavior, pointed out by Erikson (2008), the analysis of the data collected in this research revealed that the affectivity presented in the comments can often be accompanied by concrete reasons for choosing one or another candidate. Emotions, in these cases, are mixed with the rational debate of ideas.

Our analysis has focused only on the most essential characteristics of online interaction in the election process. We did not examine the general deliberative quality of the conversations taking place online. Since much of the research regarding political conversations uses a quantitative approach to data collection and analysis, studies dealing with the peculiarities of political conversation are needed. This particular topic should be the focus of further research for both Brazilian and international researchers.

We hope this paper encourages other researchers to continue investigating the strategies of online interaction and political conversations in social media. In this regard, the two tables in which we organized the data in categories for vertical and horizontal communication, can be used as a framework for further research. This framework can serve as a tool to analyze types of online interaction between participants in an online political communication process.

It should also be noted that, by investigating how the possibilities of horizontal communication among people and vertical communication between electors and political elites are used, we can offer better suggestions for people regarding the use of digital media in democratic processes. However, we know that better use of the Internet in the election process is not

something that could be decided only by the electors themselves. It is important also that the politicians and social media platforms, like Facebook, employ the technology to improve democracy and not to manipulate citizens' decisions, and follow through to address concerns about ethics and transparency. These are challenges and responsibilities that should be shared among all civil society members.

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Conflict of interest

The authors declare no conflict of interests.

Supplementary Material

Supplementary material for this article is available online in the format provided by the authors (unedited).
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Use of science in British newspapers' narratives of climate change

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Abstract

This paper investigates the use of science in British newspapers' narratives of climate change between 1988 and 2016. It is based on the analysis of eight newspapers and their Sunday and online versions (*Daily Mail*, *Daily Mirror*, *The Daily Express*, *The Sun*, *The Times*, *The Daily Telegraph*, *The Guardian*, *The Independent*). We used the keywords "climate/climatic change", "warm/warming" and "greenhouse/greenhouse effect" to retrieve the articles from the Nexis/Lexis database. To identify the articles with a specific focus on climate change, we included only those containing the keywords in the headline (9789 items). Framing theory helps interpret the process of construction of the "threat" through science by showing a tendency towards scientific consensus for the centre/left-leaning newspapers, and an instrumental use of consensus for the centre-right. These findings are useful for both scientists and policymakers interested in understanding how climate narratives can promote delay in action on climate change.

Keywords

climate framing, scientific frames, climate science communication, climate change, global warming

1 Introduction

The study of journalistic framing has been considered by some sociological approaches as relevant to interpret contemporary understanding of climate change (CC) also in relation to the different presentations of CC by media reporting. This means that scientific knowledge and content might be framed in a way that is subject to cultural "influences, political expectations, and narrative requirements" (Arnold, 2018, p. 38). This paper examines a potential evolution of themes associated with the use of scientific frames in British newspaper reporting and the prominent stories associated with the use of scientific frames over time by focusing on British newspapers reporting on CC between 1988 and 2016. The analysis is guided by narrative and framing theories. Narratives are usually considered at a macro-level in which the interpretation of the chronological facts is provided by the narrator(s), similarities among multiple narratives of the same events are identified and responses to "what" questions are provided. Framing

tends to be associated with micro-perspectives, "how" questions and the interaction of different frames, which might also generate conflicts. However, "frames serve as the underlying foundations on which narratives are expressed" (Aukes, Bontje, & Slinger, 2020, "Narrative and Storytelling" vs. 'Frame and Framing,' para. 1). Combining the two approaches, this paper investigates questions related to both how CC is scientifically framed and what the main narratives (and their evolution) are. Following Arnold (2018), the analysis of journalistic framing is relevant from a sociological point of view because media and scientific reporting tend to present the issue in different ways. This means that scientific knowledge and content might be framed in a way that is subject to cultural "influences, political expectations, and narrative requirements" (Arnold, 2018, p. 38). Since the 1990s, concerted research efforts have focused on the role of journalistic reporting in framing CC (Bell, 1994; Boykoff, 2014; Trumbo, 1996; Ungar, 1992; Weingart, Engels, & Pansegrau 2000; Wilkins, 1993). The literature



frequently holds mass media responsible for mediating communication processes between science, policy, and the public, by presenting both causes and consequences of CC, thus influencing public opinion and influencing climate governance (Boykoff, 2009; Rick, Boykoff, & Pielke, 2011). This suggests that journalistic reporting can frame CC science as “good” or “bad” science, by emphasising, or by contrast diminishing, specific aspects of the phenomenon. Therefore, the guiding research question of this paper relates to “how” newspapers use science to represent CC-related issues and to narrate the “what”. This work focuses on British newspapers because, despite an increasing number of challenges in news production (e.g., migration of news consumers to online platforms), the UK newspaper industry still reaches most of the UK population (Mediatique, 2018), and 90% of adults in Great Britain consume either print or online newspapers (NRS, 2017). Nevertheless, in the context of CC, the literature shows that UK newspapers give space to a plurality of voices even though they represent a minority (Boykoff & Mansfield, 2008; Painter & Gavin, 2015). Finally, news articles are more comprehensive in terms of both reporting existing online discourses and introducing issues / content on the public agenda (Hellsten & Vasileiadou, 2015).

The first section of the paper presents the study background and a literature review on framing CC. The second section describes the method used for both selecting and analysing a sample of articles. The third section (and its related sub-sections) reports the results of a thematic analysis that explores the themes connected to the use of scientific frames. The final section discusses the results and suggests some implications.

2 Study background

The First World Climate Conference in 1979 urged governments to tackle CC as a world problem (UNFCCC, 2006). Later, the first report by the Intergovernmen-

tal Panel on Climate Change (Houghton, Jenkins, & Ephraums, 1990) identified the need for framing the global climate crisis as the most urgent environmental problem. The IPCC First Assessment Report in 1990 identified some areas of uncertainty that derive from several factors (Rice, Gustafson, & Hoffman, 2018) related to both the evolution of the phenomenon and the exact impact of CC. CC discourses rely on scientific knowledge, but also media frameworks (Rhombert, 2010). Entman (1993, p. 52) describes the framing process as a selection of some aspects that make a piece of news memorable by providing “problem definition, causal interpretation, moral evaluation, and / or treatment recommendation for the item described”. Framing has been conceptualised in many ways, especially in relation to media effects theory. On the one hand, the media has been defined as recipients of external content, which is interpreted by individuals and “crystalised” by journalists in the public discourse (Gamson & Modigliani, 1989). On the other hand, they have been recognised to contribute towards constructing social reality by framing reality in a “patterned way” (McQuail, 1994, p. 331). These dynamics have been described as the “framing effect”, that refers to changes produced in terms of public opinion by the presentation of an issue in certain ways (Chong & Druckman, 2007). However, in both cases, despite a different intensity of the effects produced, the media are held responsible for filtering and channelling the interpretation of such reality (Scheufele, 1999). The literature also suggests that a framing effect will vary according to several factors including the context (e.g., one-sided context or competition with other frames). This is particularly evident in reporting on environmental issues (Griffin & Dunwoody, 1997) when several interpretations of the variety of scientific perspectives are provided by intermediate actors, among whom the media play a significant role (Berglez, 2011; Brüggemann, 2014; Gibson, Craig, Harper, & Alpert, 2015). This suggests that the media actively contribute to the definition of a social problem (Trumbo, 1996), here

intended as a particular situation that is perceived by the public as outside socially shared norms, and needs to be targeted by policies (Gusfield, 1989). In this direction, the media provide the public with specific interpretations of science (Rahmstorf, 2012). In the specific case of reporting on climate change, frames are defined as a scientific angle by the journalist (Griffin & Dunwoody, 1997) who legitimises specific voices that speak about the climate (Boykoff, 2013; O’Neill, 2013). They select and establish who the “experts” are and promote specific ways of conceptualising CC (O’Neill & Smith, 2014; Rebich-Hespanha, Rice, Montello, Retzlöff, Tien, & Hespanha, 2015). Therefore, since the complexity of CC is difficult to be communicated by the media (Anderson, 1997), the media might adopt scientific frames to emphasise specific aspects, (in)action and voice, but it does not necessarily mean that they rigorously report scientific findings. Previous studies highlighted that mass media tend to represent a conflict in climate science by giving a “disproportionate” space to contrarian voices even though they represent the minority within the scientific community (Akerlof, Rowan, Fitzgerald, & Cedenno, 2012; Boykoff, 2013; Rahmstorf, 2012). In turn, this produces inaccuracy (Shaw, 2013; Vestergård, 2011) and distortion of scientific results (Höppner, 2010; Jennings & Hulme, 2010). Given these premises, the overall aim related to the use of science in CC reporting is articulated in two main sub-questions. The first question relates to the evolution of CC scientific frames in British newspaper reporting over time:

RQ 1: How have scientific frames of CC evolved in British newspaper reporting?

Framing provides interpretive packages schemas (Gamson & Modigliani, 1989; Scheufele & Tewksbury, 2007) of CC, that may explicitly or implicitly promote specific pathways of action / inaction (Moser, 2010). Framing is intended here as “the process which implies a strategic selection (conscious or not) of language features for a particular purpose” (Fløttum & Gjerstad,

2017, p. 2). Specifically, the definition of scientific frames provided by Severson and Coleman (2015) is based on positive and negative forms. However, while the authors specifically refer to CC consequences (e.g., scientific frames that highlight positive or negative consequences of action / inaction), we consider the multidimensionality of CC as represented by news media using science. Therefore, this work identifies scientific frames based on the adoption of scientific voices and reporting of scientific studies in the corpus of the news articles to support the multidimensional narrative of CC.

Scientific consensus around the existence of CC and its anthropogenic causes has been increasingly recognised in media reporting (Boykoff, 2007; Gibson et al., 2015; Grundmann & Scott, 2014; Jang & Hart, 2015). In the UK, elite newspapers (2000–2010) were found to represent specific voices that speak for the climate with a combination of processes of politicisation and journalistic logics (Matthews, 2015), defined as the routinised process through which the journalists “construct” (Tuchman, 1978) and communicate information (Altheide & Snow, 1988). However, in CC reporting, in addition to both political valence and media logics, at least a third dimension has been identified in scientific terms. In fact, media routines interact with both climate science and political valence to represent the reality of climate change (Kunelius, 2014). Some approaches have contextualised the intersection between these three levels in the neoliberal scenario by attributing to the press culture a tendency to politicise public matters and represent conflictual instances between political and scientific campaigning. In turn, such a dichotomic representation produces an image of both scientists and politicians as self-interested (Cappella & Jamieson, 1997) and focused on their own agenda rather than on public matters. CC, translated in such “media logic” (Berglez, 2011), becomes a mediated political event (Akerlof, Rowan, Fitzgerald, & Cedenno, 2012). Therefore, media construction of climate news in scientific terms means that the scientific frames are also infused

of political connotation, that is in turn embedded in a neoliberal scenario in which sceptics and advocates contend the meaning of CC (Berglez, 2011).

Looking at the evolution of climate narratives in 1988, the UK press represented CC as a multidimensional threat caused by both human and “non-human” processes (e. g., solar sunspots). After 1988, CC narratives started to be influenced by the partisan nature of the debate (Carvalho, 2005, 2007). The mutability of the media representation of CC and the multidimensionality of the phenomenon progressively produced uncertain scenarios firstly about the causes of CC, and then about the effects and actions needed (Grundmann & Scott, 2014; Nerlich & Jaspal, 2014; Painter & Ashe, 2012; Painter & Gavin, 2015). White (1981) suggests that narrative becomes a problem when the real events are translated into the form of a story. This happens when the events, such as in the case of historical chronological facts, are not capable to offer themselves as stories. However, this can be also applied to scientific facts, such as e. g., CC, when the “objectivity” of the science might be narrated through the “subjectivity” of a narrative. Narrative scholars distinguish between structural elements, such as verbal units (Labov & Waletzky, 1997), form, such as genre (Smith, 2005), and content (Jones & McBeth, 2010) of the narrated stories (Arnold, 2018; White, 1987). The definition of narrative adopted here refers to the definition of problems, by identifying causes, responsibilities, and possible solutions (Fløttum & Gjerstad, 2017). This means identifying some communalities among CC stories, narrated by news media, in terms of context, actors presented (villain, heroes, and victims), a plot and (moral) action needed to deal with the effects of the situation narrated (Arnold, 2018). Therefore, the analysis of the narrative is based on an approach that is content-focused and identifies the main topic of a narrative, which in turn allows identifying the active actors, their relationships and actions (Polletta, 2006).

This is directly connected to the second question that investigates the themes associated with the use of scientific frames:

RQ 2: What are the prominent stories associated with the use of scientific frames over time?

The analysis of the topics associated with the use of scientific frames is relevant to understand what topics and aspects of everyday life are associated with the scientific construction of CC.

3 Methods

British newspapers were chosen owing to the primary role played by Britain in the international politics of CC. Moreover, its news articles are often reproduced by English-speaking print media around the world (Painter & Gavin, 2015). The news articles analysed in this work were retrieved from eight newspapers, and their Sunday and online versions, with highest circulation rates (*Daily Mail*, *Daily Mirror*, *The Daily Express*, *The Sun*, *The Times*, *The Daily Telegraph*, *The Guardian*, *The Independent*). Tabloids, that reach large segments of the population, and news and editorials that inform readers about CC were included to provide a comprehensive picture (Boykoff, 2007; Boykoff & Mansfield, 2008). Following Carvalho (2007), articles containing the keywords “climate / climatic change”, “warm / warming” and “greenhouse / greenhouse effect” in the headlines were retrieved from the Nexis / Lexis database (9789 items). The articles were grouped into three blocks (1988–1997; 1998–2007; 2008–2016) (Table 1). The periods used to observe potential differences across the three blocks were defined in relation to significant shifts described by the literature as drivers for change in climate discourse. The start and end of the first block respectively correspond to the IPCC institution and the definition of the Kyoto Protocol (Carvalho, 2007). Moreover, the end of the second block coincides with the emergence of catastrophe discourses (related to the consequences of CC) in UK

newspaper reporting (Doulton & Brown, 2009), which suggests a shift towards increasing recognition of the reality of CC. Therefore, from a conceptual standpoint, a sort of “maturation” to take place in the journalistic treatment of the issue can be expected. Finally, the Paris Conference (December 2015) represents a historical shift in climate discourse in relation to the definition of responsibilities and binding and tailored targets (Kinley, 2017). The final sample was generated as the ratio between the total number of items included in the block and the number of articles (NItems / NSample), and chronologically extracted (Boykoff & Boykoff, 2004). This also allowed for respecting the fluctuation of the number of articles over the entire period (the sample was larger in years with higher news coverage, see Table 1).

A combination of thematic and narrative analysis on the three periods investigated potential differences across the blocks. Drawing on narrative methods, we explored the evolution of the main themes to examine the development of a “plot” throughout a temporal scale (Floersch, Longhofer, Kranke, & Townsend, 2010). The narrative structure was explored by looking at the actors, motives, and actions in a setting. The exploration of multiple articles supports an understanding of a “meta-narrative” over time (Bishop, 2001). Once the main themes were identified, we recorded the characters, scene, temporal development and actions described (Foss, 1996). These were explored under the overall plot development. Using Bishop’s approach (2001), we focused on the identification of the main themes to explore these dominant elements.

Since narratives are interpreted as a view of the world in a particular way (Foss, 1996), the narrative analysis was complemented by the exploration of the scientific frames adopted to “shape” such narratives. The analysis focused on the identification of actors (with scientific “framing power”, both subject or object of the discourse) and “themes (and sub-themes)”, and how they combine in framing strategies. Scientific frames are intended as a conflictual representation of CC-related aspects

that are justified by scientific arguments and characterised by positive or negative connotations (Severson & Coleman, 2015). We identify a scientific frame whenever a news article includes references either to scientists or to scientific findings within the corpus to explore how they are integrated into broader narratives about CC. An article is classified as adopting a scientific frame when scientists or their findings are used to make some arguments and aspects salient. The following example shows how scientists can be used to support a relation between diseases and warming climate: “Scientists say diseases including dengue fever and the West Nile virus could become common as warmer weather attracts insects from parts of Asia and Africa” (Batchelor, 2015). The themes were identified through an inductive approach based on reading the articles several times and classifying the emergent topic supported by climate science.

Table 1: Sample of articles extracted per block of years

Years	N Items	n Sample
1988–1997	396	197
1998–2007	1933	389
2008–2016	7460	372
Total	9789	958

4 Results

The use of science to justify news articles narratives was found in 308 cases. Table 2 shows an increase in the adoption of science across the three blocks. A first characteristic, emerging from this table, relates to the existence of different themes in relation to the political orientation of newspapers. Given this peculiarity, the following sections discuss the specific themes that emerged by also considering two macro-areas related to centre-left (*Daily Mirror, The Guardian, and The Independent*) and centre-right (*Daily Mail, The Daily Express, The Sun, The Times, and The Daily Telegraph*). Given the difficulty of attributing a precise political orientation to newspapers, as highlighted by the litera-

ture (Edwards & Cromwell, 2006), the two macro-areas were identified through the classification provided by YouGov (2017). The newspapers were selected based on circulation rates. Therefore, the number of newspapers that belong to the centre-left (CL) and centre-right (CR), as well as the number of articles, is unbalanced because it reflects the real number of articles published in the entire period. However, the analysis of the opinion-leading press can provide a robust picture of how British newspapers adopt climate science to support their narratives. The Online Supplement provides a summary of the emergent themes, their frequencies, and examples.

Table 2: Distribution of articles that adopt science across the three blocks

Years	N Items	Centre-right	Centre-left
1988–1997	65	10	55
1998–2007	116	31	85
2008–2016	127	49	78
Total	308	90	218

4.1 Centre-left scientific frames

Four macro themes emerge from the analysis of the CL articles across the three blocks (see Online Supplement A).

A first macro-theme emphasises the scientific consensus around the causes of the problem and its future consequences by representing the scientific community as a unique voice / character of the narrative. This happens from the first block and continues throughout the period under consideration by using expressions such as “most scientists” (King, 2005) and “the evidence is mounting all-round” (The Independent, 2011). Within the consensus macro-area, two main sub-themes, which also set the scene and point out the action needed, can be identified related to i) consensus around risks / consequences and visible signs of CC (scene); ii) adaptive capacity of society (also through geoengineering technology) as a moral issue (action).

The first sub-theme shows the use of scientific frames to attribute ecological variations to CC, as well as impacts on

both humans and nature. These articles set a scene in which CC is a risk with “long-term effects” (Lean, 1995), and even when they list some potential benefits, they frequently mention negative consequences (Macalister, 2004). Such representation of the severity of CC consequences increases across the three blocks. The third block shows an evolution of the narrative in which climate science is often represented as settled around both causes and consequences of CC, which will cause “drastic harm” (Connor, 2007). A sense of urgency is emphasised due to the evident symptoms of CC such as e. g., melting “polar ice sheets” (Ashdown, 2012), hot waves records (Connor, 2014) and rising of “temperatures” (Connor, 2016).

Scientific evidence also supports a second sub-theme related to the adaptive capacity of both ecological and human systems to changes. The second block confirms that the environment can be better understood by investing in research. Negative predictions about the impact of CC are often counterbalanced by positive messages about the possibility of limiting the damage if current practices are corrected (Vidal, 2006). However, CC is predominantly represented as a risk that can cause “turbulence” (Pearce, 2006) in both human and natural systems. In the third block, even though delay in action might cause devastation, scientists are confident that there is “still time to take meaningful actions to reduce the impact” of CC (Abraham, 2016). Especially in the third block, the action becomes a “moral obligation” that involves global and social justice-related challenges (Brown, 2012).

A second macro-theme describes the scientists-characters as political and economic advisors, who encourage / support the reduction of greenhouse gases through new policies and economic strategies (Brown, 2000), and criticise some political choices (Pilkington, 2008). The second block confirms this tendency to use science either to support interdisciplinary efforts for implementing energy-related measures (Elliott & Seager, 2007) or to criticise political directions (The Guardian, 2007). The third block further encourages

economic actors and policymakers to collaborate with scientists to implement market regulation and invest in mitigation and sustainable production systems (Moodie, 2015).

A third macro-theme can be labelled as “confutation of scepticism”, which sets a scene in which scepticism is described as underpinning political-economic interests in defending oil industry activity, delaying action and disseminating misleading information. Economic and political interests are held responsible for spreading scepticism (Vaughan, 2010) and for stoking inexistent scientific controversies to delay action (Monbiot, 2009) across the three blocks. Especially in the third block, defensive tones are adopted to respond to “accusations” such as e.g., in the case of the “Climategate scandal” of November 2009 (release of more than a thousand emails and documents hacked from the University of East Anglia (see Leiserowitz, Maibach, Roser-Renouf, Smith & Dawson 2012). Defensive tones can be found e.g., when responding to sceptics’ attempts to “show that much of our recent CC is just natural” (Abraham, 2014).

Finally, a fourth macro-theme includes articles that reference both “sceptical” and “advocate” positions or refer to sceptical positions. This happens e.g., when referring to “disagreement” among scientists (McKie, 2007), a “poisoned debate” (Adam, 2010, p. 30), “exaggerated” forecasts (Nicholson-Lord, 1990) and a “receding certainty” (Pearce, 1993). In the second block, e.g., one article questions the anthropogenic causes of CC by both using mocking tones (Lawson, 2007) and referencing a documentary that contains some scientific mistakes (Boykoff, 2008). In the third block, some sceptical arguments about the impact of CC are reported and debated (Nuccitelli, 2014, 2015).

4.2 Centre-right scientific frames

Two main macro themes emerge from the analysis of the CR articles (see Online Supplement B).

A first macro-theme characterises a scene in which scepticism is narrated through three main sub-themes related

to i) scientific disagreement among the scientist-characters who disagree around different aspects of climate science (e.g., existence, causes and consequences); ii) emphasis on scientific dishonesty behind the promotion of CC; and iii) scientific uncertainty around future impact and action to be taken.

The first sub-topic emphasises the existence of sceptical positions within the scientific community and contrasting understanding of CC about several aspects. There is a tendency to refer to natural fluctuations (McCarthy, 1989) and scientists’ disagreement (Hosenball, 1990) around the causes and consequences of CC. Therefore, CC is described as a “myth” across the three blocks (Bellamy, 2004, p. 12; Daily Mail, 2002; Delingpole, 2009; Rose, 2013), and sceptics are surrounded by a scientific “aura” (Clark, 2013).

The second sub-theme expresses the dishonesty of climate scientists and sets a scene in which scientists manipulate scientific data to scare people and receive grants for their research. This topic emerges in the second block by e.g., describing scientists as “eco-doomsters” and climate science as “orthodoxy” (Phillips, 2006), and increases in the third block by quoting scientists who admit being “alarmist” about CC impact (Warren, 2014). In the second block, climate scientists are still described as a “lobby” (Jenkins, 2006) and “doom-mongers” (Hanlon, 2006), climate predictions are defined as “an art rather a science” (Simons, 1998). The third block more often accuses scientists of manipulating data to support their arguments (Delingpole, 2013) and “suppressing [dissenting] research” (Carter, 2014). Scientists are accused of receiving public money to produce studies that support tax increases. Uncertainty derives from science, which is not “settled” (Webb & Smith, 2013).

The third sub-theme shows uncertainty about both the reality/severity of CC consequences and the need for intervention. Greenhouse effect and global warming are also described as potentially beneficial (Austin, 2016; Daily Mail, 1992; Lambie, 2005). Furthermore, policies that

are based on “figures [that are not even] halfway believable” (Booker, 2009, p. 16; Webster, 2013) will cause economic damage. By contrast, CC may produce benefits for other characters of the narratives such as wine producers (Derbyshire, 2007), food producers (Beall, 2016; Prigg, 2014), producers of medical plants (Daily Mail, 1992) and the tourist sector (Batchelor, 2015; Graham, 2013).

A second macro-theme shows consensus / instrumental consensus. While some articles focus on scientific consensus around several aspects of CC, in other cases the consensus is “accepted” under certain conditions. These include the discussion of causes / consequences that are described as real (and sometimes catastrophic) if located in faraway places / scenes and distant in time, and the impossibility of tackling the problem.

A first sub-theme shows the use of “instrumental consensus”. In this case, CC consequences mainly affect nature / animals (Austin, 2016; Smith, 2001) or result from natural processes (Daily Mail, 1994). These articles also locate the problem in an abstract future (Simons, 1997) that will affect the “world’s poor” (Clover, 2007). In the second block, CC is often represented as real, but alarmist tones (e.g., “impacts of CC will be devastating”, Winter, 2004) emphasise the impossibility of acting. In the third block, a mixture of tones that range from extremely dramatic to reductive can be simultaneously found. In some cases, consensus might concern some aspects of CC, but scientific findings are described as controversial and uncertain (Collins, 2013). Examples of this tendency are expressions such as “it is possible this can be related” (McCarthy, 1992b), “before they can make more accurate predictions” (Roy, 1989) and “some scientists believe” (McCarthy, 1992a). Moreover, even when scientific consensus emerges, the lack of cooperation of some international political actors transmits a message that it is difficult to act (Radulova, 2014; Stone, 2011; Thornhill, 2013).

The second use of consensus includes a genuine recognition of the existence of CC and its related negative consequences.

The need for intervention is emphasised, especially when supporting specific energy production systems (Hardy, 2004; Leake, 2005) and discussing market mechanisms (Pearce, 1990; Stone, 2011) and technological progress as potential solutions (Highfield, 2004; Searjeant, 2005; Spencer, 2014).

5 Discussion and conclusions

Different uses of scientific frames that shape specific narratives can be identified in relation to the political orientation of newspapers. Both groups of newspapers represent either consensus or scientific disagreement but in a different way. This is directly connected to the research questions of this paper related to the identification of a potential evolution of themes associated with the use of scientific frames. The exploration of themes enabled us to understand the scene and identify the characters, plot and potential actions associated with two different narratives characterised by specific political orientation, which are in turn backed up by the use of science / scientists.

Alongside some constant macro-traits, an evolution of both narratives can be observed, which for the CL increasingly embraces scientific certainty, whereas for the CR scientific confusion.

Across the three blocks, the CL supports a plot based on scientific consensus. Science tends to be used to frame a narrative that supports the existence, severity and need to act against CC. Previous studies (Lineman, Do, Kim, & Joo 2015; Manzo, 2012) found that the adoption of positive messages and language enhances both public trust in scientists and support for CC policies (Feldman, Myers, Hmielowski, & Leiserowitz 2014; Hmielowski & Nisbet, 2016; Nisbet, Cooper, & Garrett, 2015). Accordingly, CL newspapers channel positive messages to invoke intervention and conceive scientists as political / economic advisors. However, especially in the third block, “defensive tones” are often adopted to defend the rigours of science against sceptics’ accusations. Scientific findings are also used to support a “morality” relat-

ed to climate “(in)justice”, inequalities and duty to act to protect the environment and living being’s existence.

In contrast, the CR newspapers often adopt scientific characters in their narrative who lack expertise in climate science (Dunlap & McCright, 2010; Mulvey & Shulman, 2015) and scientific language to either deny or question several aspects of the phenomenon. Some spokespersons, such as e.g., Philippe Stott (2003; Daily Mail, 2002; Matthews, 2003), are used to criticise policy intervention (Searjeant, 2004). In addition to questioning the scientific predictions about the effects of CC (Carter, 2014; Carpenter, 2011; Delingpole, 2011), the focus often shifts towards the economic impact of climate policies (Pearce, 1990; Stone, 2011) and the political nature of climate debate (Matthews, 2000; Radford, 2009). Starting from the second block, the scientific consensus increases, but the styles and arguments adopted suggest that scientific consensus can be used instrumentally. The combination of narratives that describe CC as out of human control and simultaneously refer to scientific uncertainty about the reality or the severity of these consequences, plus the description of consequences as potentially beneficial, contribute towards creating a confusing image. Scientific frames are also associated with damage to the natural environment and people who live in “faraway” places and thus are “invisible” (Ungar, 1995, 2001). Furthermore, the preference of CR newspapers for attributing responsibility to international commitments shifts the problem to a global arena (Ford & King, 2015; Moser, 2014; Takahashi & Meisner, 2013). This, in turn, further contributes towards creating an abstract image of a “faraway” problem. Therefore, the adoption of a “flood myth” style (von Burg, 2012), combined with the idea of the impossibility of acting, increases confusion. This is confirmed when the “status-quo” is explicitly and implicitly supported by using “uncertainty” to justify inaction on CC. The use of a scientific frame to support a narrative based on uncertainty about several aspects of CC might be interpreted in the light of a neoliberal press culture that

is based on conflictual instances between political and scientific characters. This has been attributed to their focus on their own agenda rather than on public matters (Phelan, 2014). CC has been interpreted as a mediating topic that generates forms of reciprocal dependency between different spheres of society (in particular, politics, science, and mass media) (Rhomberg, 2010). Further, scientific framing of climate news also sets a “politicised” scene in which sceptics and advocates contend the meaning of climate change. Therefore, even when the main characters of such narratives are represented by scientists, their actions and messages tend to assume politicised meanings, which in turn reflect the conflicts of a neoliberal scene (Phelan, 2014). The uncertainty related to scientific findings and action needed in terms of policies tends to be exacerbated by the newspapers, which tend to distinguish those scientists who believe that CC is happening and will have significant consequences (CL), and those who are sceptic (CR) (Boykoff, 2013; Rahmstorf, 2012). However, this minority of sceptical scientists have been frequently found to be supported by oil corporations (Levy & Rothenberg, 1999). While uncertainty is intrinsic to scientific models based on multiple different potential inputs used to predict future scenarios, and it is usually interpreted as a driver of progress (Corner, Whitmarsh, & Xenias, 2012), Dunlap and McCright (2010; pp. 240–259) refer to a “manufacturing uncertainty” used to overshadow the need for environmental regulation.

These findings expand the literature on how media frames can become a vehicle of either support to climate science or sceptical perspectives that cast doubts around the need for policy action. In other words, the analysis demonstrates the existence of different narratives that might influence or reinforce the opinions of newspapers’ readers, whose support is fundamental for policymaking. It should be also acknowledged that the literature on frames adopted by the media produced controversial results (Fahy, 2017). Some studies identified an evolution from a

starting phase characterised by a “(false) balance” around the scientific consensus on CC (Boykoff & Boykoff, 2004, p. 128), moving towards a disappearance over time in both the US and UK (Boykoff, 2007). By contrast, some other studies (e.g., Painter & Gavin, 2015) highlighted a persistence of sceptical sources in the English context. However, these contradictory results might also be explained in the light of a shift of attention from reporting scientific conflicts around the causes towards the consequences of climate change and the action needed (Ruiu, 2021).

Science-driven changes might be challenging for governments and economies dependent upon fossil fuel resources (Dunlap & Jacques, 2013; van Rensburg & Head, 2017). The literature shows how the carbon-dependent “status quo” is promoted by the oil lobbies by creating *ad hoc* think tanks that channel their messages (by employing “unqualified scientists”) through the mass media (McCright & Dunlap, 2003; Moser, 2010) or responding to them to protect their own interests (Bacon & Nash, 2012). Framing CC means combining multiple journalistic, public, scientific and political interpretations. For example, for the CL, Dominic Lawson (son of Nigel Lawson, a British conservative politician and journalist who founded the The Global Warming Policy Foundation, conservative think tank) criticises climate science and policy choices on CC (see e.g., Lawson, 2006, 2007, 2008). This suggests that, especially in the context of CC, editors, journalists and reporters unconsciously or consciously frame their narratives based on “interiorised” routines, which might also lead to inaccurately interpret the evolution of a phenomenon. Considering these individual interpretations in the context of the identified macro-tendencies, news workers might “interiorise” a routine in their work by combining and negotiating external pressure and their own perspectives (Berglez, 2011). However, it is not possible to speculate on newsroom mechanisms at this stage. This opens new questions for further investigation of the interplay be-

tween external pressures, journalists’ personal opinions, and knowledge about CC.

The role of narratives in influencing social life and mobilisation of people / resources has been recognised by the literature (see e.g., Bruner, 1991; Dahlstrom, 2010; Smith, 2010). Moreover, collective narratives tend to be influenced by news media, which tend to identify intentions, victims, villains, and heroes (Boholm, 2015). These findings further support studies showing that framing CC by using science to emphasise specific aspects, or by contrast neglect / discredit some others, promotes the existence of “good” and “bad” science. Accordingly, the differences between the two groups suggest that political orientation plays a role in supporting scientific consensus around CC.

Generalising these results to the four nations of the UK and covering the nuances in media framings, such as national-regional dimensions, is limited. Moreover, this study tried to provide a comprehensive picture of UK newspapers reporting by including both news and editorials (Boykoff, 2007; Boykoff & Mansfield, 2008). However, the study did not distinguish between the two types of articles and distinctive characteristics in terms of framing and narratives cannot be derived at this stage.

Conflict of interest

The authors declare no conflict of interests.

Supplementary Material

Supplementary material for this article is available online in the format provided by the authors (unedited).

<https://www.hope.uzh.ch/scoms/article/view/j.scoms.2021.02.004>

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No government mouthpieces: Changes in the framing of the “migration crisis” in German news and infotainment media

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Abstract

This study investigates the German media’s framing of the 2015–2016 “migration crisis” and their support and criticism of the initial open-door policy. A standardized content analysis examines changes in media frames following the key event of assaults on New Year’s Eve (NYE) 2015. It is analyzed how changes in coverage differed between public broadcasting news and infotainment formats (talk and satirical shows) and how they were related to governmental communication. The findings contradict ideas of a state-conforming and uniform coverage of the “migration crisis.” Media coverage did not parallel the governmental switch from support for the open-door policy to ambivalence after the NYE incidents but challenged governmental communication with critical counter frames. Regarding support for the open-door policy, the news media showed some parallels to the government’s frames; however, the infotainment media deviated in their frame agenda from the news media and thus contributed to diversity in media discourse.

Keywords

content analysis, crisis communication, infotainment, migration crisis, newscast, political satire, public broadcasts, talk show

1 Introduction

Since the late summer of 2015, migration has become an intensely politicized issue in almost every European society (Barlai, Fähnrich, Griessler, & Rhomberg, 2017; Krzyżanowski, Triandafyllidou, & Wodak, 2018). Extensive media coverage centered on refugees drowning in the Mediterranean Sea on their way to Europe and images of migration movements from Syria, Afghanistan, and Iraq to and throughout the European Union (EU).

During the so-called “migration crisis,”¹ Germany was the main destination country for asylum seekers (Juran & Broer, 2017). In the German public discourse, the emotional and televised encounter of chancellor Angela Merkel (Christian Democratic Union) with the Palestinian

refugee girl, Rem, in July 2015 and later the iconic image of the dead body of Aylan Kurdi at the Turkish shore invoked intense moral pressure on migration and asylum policies (Vollmer & Karakayali, 2018). In this situation, Merkel’s famous dictum from August 31, *We Will Manage It*, set a strong frame that emphasized the high influx of migrants as a societal challenge, addressed citizens as a collective *We*, and motivated them for collective action in the name of humanity. The frame shaped governmental actions and subsequent public perceptions of events (Mushaben, 2017; Pries, 2020). In September 2015, more than 1000 refugees who were detained in Hungary marched out of Budapest toward the Austrian border. In agreement with Austrian officials, the German government decided to welcome refugees and allow them access to Germany instead of closing the borders.

At first, this open-door policy was broadly praised by the German public. In the later stages of events, however, justi-

1 Migration was neither related to a significant economic breakdown nor to a similar strong social disruption as in the cases of war or natural disaster; hence, the quality of the situation as a crisis is contentious (Udris, 2019).



fyng the decision became difficult. The public mood changed from solidarity and a welcome culture to warnings of a cultural clash, increased crime, and social problems, such as a housing shortage. Additionally, the German government shifted toward more restrictive policies, for instance, limiting the right to family reunification, extending the definition of safe countries of origin, and implementing measures for the faster deportation of irregular immigrants and rejected asylum seekers (Vollmer & Karakayali, 2018). Within this process, several scholars identified the incidents on New Year's Eve (NYE) 2015 as a key event for changes in the discourse on the "migration crisis" and the public acceptance of migrants in Germany (Czymara & Schmidt-Catran, 2017; Vollmer & Karakayali, 2018). On NYE 2015, groups of men, most reportedly migrants from North Africa, attacked, robbed, and sexually harassed hundreds of women in Cologne and other German cities. While the German government was faced with accusations for a failed migration policy, the fact that, at first, German news media reported only gradually on these mass sexual assaults contributed to public media criticism and right-wing hostilities, first and foremost, against public service media (Bielicki, 2018).

This study investigates how the media's framing of the "migration crisis" changed following the incidents on NYE and to what extent German media supported or criticized the initial open-door policy before and after NYE. Unlike most previous works that have been limited to examinations of the news media's coverage of the "migration crisis," the content analysis presented in this study encompasses hard-fact oriented news and infotainment media formats that deal with a softening of news (Otto, Glogger, & Boukes, 2017). Due to the trends of commercialization and digitalization, infotainment media formats – such as soft-news-focused newscasts, political talk shows, and satirical shows – have become an important part of today's pluralized media landscape (Farnsworth & Lichter, 2003; Thussu, 2007). Although they are rarely studied in political

communication science, they must be considered to contribute to public opinion formation, and, in their depiction, they might deviate from the news media (Wessler, 2018). The sample for the media material under study comprises newscasts, talk shows, and satirical shows from German public broadcasting. To assess how frames in media coverage are related to changes in government communication before and after NYE, the study on media content is complemented with an analysis of government communication.

The present article contributes to research on the media's role during the "migration crisis" and on media-politics relations. The findings from the content analysis shed light on how the incidents on NYE 2015 have shaped the media's depiction of the "migration crisis," how changes in media coverage were related to changes in governmental communication, and how news and infotainment formats differed in their framing when they supported or criticized the open-door policy. The findings contradict widespread suspicions against public service broadcasts for being biased in favor of migration and providing concordant and one-sided coverage (Brauck, Diez, Kühn, Müller, Nezik, & Steinmetz, 2016). It is demonstrated that the media functioned critically toward the open-door policy and governmental communication before and after the NYE incidents. Since infotainment media deviated in their support and criticism of the open-door policy from the news media, they contributed to diversity in media discourse.

2 The media's role in crisis communication

Political communication scholars have intensively discussed the relation between policymaking and the media (e.g., Baugut & Scherr, 2019). Although the media and politics are, to some extent, separate spheres with different agendas (Meyer, 2002; Roggeband & Vliegthart, 2007), the media's influence on the citizens' agenda and their perceptions of political issues are

broadly acknowledged. For policymakers, they thus serve as an arena for frame competition as well as an indicator of the legitimacy of politics (Suchman, 1995; Wolfe, Jones, & Baumgartner, 2013).

From a normative point of view, the media are tasked with contributing to democracy by providing reliable information and orientation, promoting social integration, and mobilizing individuals for societal objectives. The media should enable exchange and discussion between politicians and citizens and hold officials accountable (Blumler & Coleman, 2015; McQuail, 2010). Regarding the media's normative role in media-policy relations, Christians, Glasser, McQuail, Nordenstreng and White (2009) differentiate between the main functions of criticism and cooperation. In their critical role, the media scrutinize political leadership. While alternative or critical media take a radical stance against power, mass media in the political mainstream instead function as watchdogs. They observe and comment on current processes and events and “bark” in the case of risks, threats, and dangers (Christians et al., 2009; Zaller, 2003). To fulfill their critical function, the media are asked to confront policymakers with at least one counter frame to the official governmental interpretation (Entman, 2004).

In contrast, in their cooperative role, the media do not place themselves in explicit antagonism with political power but instead support societal processes. When they give voice to civil society actors, promote participation, or focus on reason and context instead of conflict, for instance, the media can facilitate public deliberation, conflict resolution, and citizens' self-government (Lynch & McGoldrick, 2005; Wessler, 2018). In some cases, they collaborate with the state, thereby contributing to the creation of public consensus for specific policies and policy reforms. While the media's cooperative role generally bears the risks of elite control and diminished diversity, in crisis situations, cooperation can prevent panicked reactions among citizens and help push the appropriate political crisis responses (Christians et al., 2009).

Empirical findings on media-policy relations are mixed. In a survey study, scholars found that political elites perceived the media to be influential for political careers and the policy agenda (Lengauer, Donges, & Plassner, 2014). Comparing policy documents with media coverage, content analyses found a rather moderate, and not unidirectional, agenda-setting effect of media coverage on the political agenda (Vliegthart & Roggeband, 2007; Walgrave, Soroka, & Nuytemans, 2008; Walgrave & van Aelst, 2006). According to Dekker and Scholten (2017), the media's impact on the policy agenda is strongest when a variety of media outlets are consonant in their position on an issue and when this common position differs from the official policy agenda.

Most studies on the media-policy relation use the framing approach. A frame is “a central organizing idea or story line that provides meaning to an unfolding strip of events” (Gamson & Modigliani, 1987, p. 143). Frames emphasize a particular problem definition, its underlying causes, and its consequences. They thus promote a certain interpretation that contributes to the persuasiveness of arguments and suggests a positive or negative evaluation of the issue at stake (Entman, 1993). Policymakers use frames strategically. They are likely to receive support for their crisis politics in media discourses when they adopt coherent and mutually reinforcing frames. To present their actions as “desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs and definitions” (Suchman, 1995, p. 574), policymakers use frames that resonate with a society's culture, apply to common values (e.g., democracy and peace), and strengthen support for the proposed crisis response as a question of morality (Entman, 2004; Olsson, Söderlund, & Falkenheimer, 2015).

According to Bennett's (1990) *indexing thesis*, the media tend to accept political leaders' frames as long as top-level officials present a unified front, while counter frames may become more prevalent in cases of open controversy about the issue at an elite level. Empirical studies on media

content have found that counter frames are limited, but not marginalized, in crisis situations, and the elite dominance of media frames is reduced over time (Bennett, Lawrence, & Livingston, 2006; Glazier & Boydston, 2012; Hayes & Guardino, 2010). While the media have been found to exert efforts that demand accountability from the government, Bytzek's (2005) analysis of the German media's coverage of German engagement in the Kosovo crisis demonstrated that criticism by the media was basically related to specific actions and measures but did not challenge the legitimacy of the government's policy. In addition, the media's tendency to domesticate (global) crisis events by stressing the relevance for their own country and focusing on national actors (Eide & Ytterstad, 2011) can lead to parallels to official communications. Conversely, in cases of domestic crises, a broad range of midlevel sources provides journalists with information. Unlike foreign policy crises, media coverage of domestic events has thus been found to substantially diverge from governmental communication (Allen & Blinder, 2018).

3 Framing migration in media and policy discourses

Migration policy is well known for being a highly contested policy domain (Bonjour & Schrover, 2015; Vliegenthart & Roggeband, 2007). In political and media debates, competing frames portray migrants as victims, intruders, or economic refugees and deal, for instance, with criminality, illegal migration, and Islam as threats as well as long-term economic risks and prospects (e.g., Benson, 2013; Greussing & Boomgaarden, 2017; Helbling, 2014; Horsti, 2007; Ihlen & Thorbjørnsrud, 2014; Roggeband & Vliegenthart, 2007; van Gorp, 2005). Dekker and Scholten (2017) summarized the variety of frames identified in different studies into four master frames: 1) human interest, 2) migration as a threat, 3) economy, and 4) migration as a governance challenge.

Previous studies have found conflicting interactions and mutual influences be-

tween migration-related frames on policy and the media agenda (Dekker & Scholten, 2017; Ihlen & Thorbjørnsrud, 2014; Vliegenthart & Roggeband, 2007; Walgrave et al., 2008). In line with the indexing thesis, debates or reforms in the policy arena trigger media coverage and provide orientation for the media's framing of migration (Bonjour & Schrover, 2015; Vliegenthart & Walgrave, 2011). Klocker and Dunn (2003) found that the media followed the government's negative tenor toward asylum seekers. However, the media can shape migration policies by stressing frames that are not dominant on the policy agenda. As some authors have argued, the coverage of migration in terms of a crisis and the presentation of migrants as intruders can push restrictive migration policies or hinder reforms for liberalization (Suro, 2009; Vukov, 2003). This is different when migration is predominantly framed as a governance challenge on the policy agenda, and the media simultaneously deploy the human-interest frame by focusing on life stories and individual tragedy. This constellation leads to a highly emotionally loaded "David versus Goliath" or "human against the system" debate, which can pressure political leaders to make exceptions in singular cases or produce a more general policy turn toward liberalization (Bonjour & Schrover, 2015; Dekker & Scholten, 2017; Horsti, 2007; Ihlen & Thorbjørnsrud, 2014).

Regarding the German discourse on the "migration crisis," studies revealed an overall consonance between the different news media's coverage that was seen as largely consistent with the policy agenda (Greck, 2018; Haller, 2017; Hemmelmann & Wegner, 2016; Maurer, Jost, Haßler, & Kruschinski, 2019). In the news media, the "migration crisis" was initially depicted as a humanitarian catastrophe that required immediate action. Even though the media were concerned with sociocultural challenges and the limited capacities to deal with the high influx of refugees, according to Haller (2017), the notion of German welcome culture was actively supported by journalists. In a more nuanced analysis, Maurer et al. (2019) demonstrated that

print and TV news media covered migrants in a positive tonality when individual and human-interest aspects were covered. Meanwhile, negative tonality was related to more abstract coverage dealing with migration as a risk and danger. Even though media coverage was found to be accurate in light of official statistics (Maurer et al., 2019), in the general picture, the media took a rather supportive position toward governmental communication and policy decisions.

Several authors, however, have identified the incidents on NYE 2015 as a key event in German media discourse. Accordingly, the media began to strongly emphasize threats to security and cultural homogeneity in Germany (Haller, 2017). In the media representation of migrants, NYE marked a shift from predominant attention toward vulnerable individuals and groups (children, female migrants, families) deserving help and compassion to young men who were perceived as a societal danger and the cultural “other” (Vollmer & Karakayali, 2018). Consistent with this previous work, it can therefore be expected that after the NYE events, the German media deployed stronger criticism of the open-door policy in their framing of the “migration crisis” compared to the time before. Therefore, I propose the following hypothesis:

H1: In the media’s framing of the “migration crisis,” criticism of the open-door policy increased after the NYE events compared to the time before.

Existing studies have analyzed the content of hard-fact oriented news media, whereas research on infotainment media formats covering the “migration crisis” remains scarce. Contrary to quality newspapers and public broadcasting news that routinely select, structure, and comment on information from the daily stream of events, commercial and highly soft-news-focused newscasts, political talk shows, and satirical shows combine information with an entertaining style of presentation. In their coverage of the “migration crisis,” they are expected to have deviated from

the news media in two significant ways: the extent to which they support or criticize the government’s crisis management (and the open-door policy in particular), and the frames on which they base their support and criticism.

For example, political talk shows are a forum for discussing conflicting frames. As the selection of guests follows the principle of “confrontainment” (Klemm, 2015), or entertainment by confrontation, talk shows frequently include critical voices that challenge the government’s policies. Other infotainment formats are even more likely to fulfill the media’s critical function. Most prominently, satirical shows challenge established perspectives in current political and societal debates with a counter-narrative meant to criticize political leaders and traditional media discourses (McClennen & Maisel, 2014). According to studies on the depiction of the Ukraine crisis (Lichtenstein & Koerth, 2020) and the “migration crisis” (Nitsch & Lichtenstein, 2019), criticism of governmental policies is especially strong in satirical shows when the news media tend to support the government’s position. In the case of the “migration crisis,” the news media are expected to have supported the open-door policy before NYE and shifted toward criticism in the time after, when the government also shifted toward more restrictive policies. Therefore, the opposite is hypothesized for infotainment formats:

H2: Compared to the news media, infotainment formats deployed a lower share of frames supporting the open-door policy before the incidents on NYE and a higher share of supportive frames in the time after.

In more detail, news and infotainment formats are expected to have differed in the frames that they deployed when they supported and criticized the government’s open-door policy during the “migration crisis.” Based on Bennett’s (1990) indexing thesis, the news media are likely to adapt to government’s frames in their support for the open-door policy before the incidents on NYE. Infotainment formats, how-

ever, are said to focus less on policy issues while placing a stronger emphasis on human interest, conflict, and the emotional aspects of political issues (Baum, 2007; Reinemann, Stanyer, Scherr, & Legnante, 2012). They are expected to have framed support for the open-door policy as against tendencies toward populism and xenophobia. Similarly, in their criticism of the open-door policy, infotainment formats might have focused less on policy criticism than on the government's performance as a crisis manager. Conversely, the news media are expected to have given policy criticism on the open-door policy. Therefore, in addition to H2, I propose the following two hypotheses:

H3: In their support for the open-door policy before the incidents on NYE, infotainment media formats criticized populism and xenophobia more frequently than the news media.

H4: In their criticism of the open-door policy, the news media used policy-related frames more frequently compared to infotainment media formats.

4 Method

To assess how news and infotainment media formats supported or criticized the open-door policy in their framing of the "migration crisis," a systematic content analysis of media coverage in Germany was conducted. Additionally, to consider changes in governmental communication before and after the NYE incidents, the media analysis was supplemented with an analysis of government communication. The study examines and compares issue-specific frames. In contrast to studies on generic frames (which are more abstract categories that can be analyzed in relation to different topics), the analysis of issue-specific frames enables the exploration of the specific story lines about the "migration crisis" presented in news and infotainment media formats and governmental communication (de Vreese, 2005).

4.1 Material under study

The analysis of government communication was based on press releases, government statements, and transcripts from federal press conferences. The media sample consisted of a daily TV newscast and the infotainment formats of political talk shows and satirical shows. Due to the plurality of existing media outlets, the sample is not representative of the German media landscape. For instance, it lacks conservative and liberal quality press, weekly magazines, the regional press, tabloids, and online news formats on YouTube. The sample, however, enables a comparison between prominent news and infotainment formats and extends the spectra of media formats that are usually analyzed in crisis discourses.

The newscast *Tagesschau* was selected because of its high reputation and broad reach (see Appendix, Table A1). The analysis of political talk shows referred to two of the broadest-reaching programs in Germany, *Anne Will* and *Maybrit Illner*, both of which are broadcast weekly. Three satirical shows were chosen, namely, the news satire show *heute-show*, the late-night show *Neo Magazin Royale* (both broadcast weekly), and *Die Anstalt* (broadcast once a month), which follows the tradition of cabaret theater. All the media selected are broadcast by German public service stations.

The analyzed period started in September 2015 after Merkel's dictum, *We Can Manage It*, and her decision to implement the open-door policy, and it ended in April 2016 (Table 1). This timeframe enables the differentiation between two periods that are distinguished by the key event of NYE 2015, which was related to a discursive shift in public communication according to prior research (Haller, 2017; Hemmelmann & Wegner, 2016; Maurer et al., 2019). Due to the sample's heterogeneity, the exact sampling procedure varied among the different kinds of material under study. Government communication and the satirical shows entailed few frames per unit and were thus selected from over the whole period. Relevant governmental communication pieces were collected on the German government's official website

Table 1: Material under study

	Government communication	Newscast	Talk shows	Satirical shows
Sep 1–Dec 31, 2015				
Press releases/broadcasts	44	20	5	32
Relevant thematic segments	0	68	0	80
Frames	62	255	266	251
Jan 1–Apr 30, 2016				
Press releases/broadcasts	21	20	6	25
Relevant thematic segments	0	52	0	62
Frames	43	179	223	180

(<https://www.bundesregierung.de/>) and identified by a keyword search using the terms *Flucht*, *Flüchtling**, and *Migration*. The coding referred to a random sample of 65 relevant government communication pieces. For the satirical shows, all 57 shows that addressed the “migration crisis” as the main topic in at least one thematic segment were selected. The relevant shows and segments were identified by using data from a previous project on political satire (Nitsch & Lichtenstein, 2019).

The investigation period for the newscast and talk shows was limited to 31 days, starting from the day after the key event (period 1: the open-door policy implementation on September 5, 2015; period 2: after NYE 2015). Within this time frame, the coding referred to a random sample of 20 broadcasts per period for *Tagesschau*. Only crisis-relevant thematic segments of the newscast were coded. These were identified by the broadcast description on the website *Tagesschau.delarchive*. For talk shows, all broadcasts that referred to the “migration crisis” in their title or announcement in the defined time frames were selected (11 in total). Since talk shows are monothematic, coding referred to the complete shows.

4.2 Analysis and measures

In government communication and media material, the coding unit was the single frame of the “migration crisis” as occurring in a sentence or some connective sentences uttered by a specific public speaker. A frame establishes a specific understanding of the situation, for example, as a humanitarian crisis in Arab countries

or as a political crisis in Germany. The coding followed a standardized procedure using strictly defined categories to classify demanding interpretations (e.g., Gamson & Modigliani, 1989; Simon & Xenos, 2000). The catalog of frames stemmed from a qualitative pre-study of a selection of the material following Mayring’s (2014) summarizing approach. In the pre-study, 10 frames were identified and differentiated inductively and structured into three frame groups according to their main focus on the crisis (Gamson & Modigliani, 1989). In line with Entman’s (1993) popular definition of a frame consisting of four elements, the frames of the “migration crisis” were coded as a specific combination of a problem definition, causal interpretation, moral evaluation, and treatment recommendation. In the problem definition, frames deal with a global, European, or German perspective, which was decisive for the systematization of frames into frame groups.

Ten frames and three frame groups were differentiated. The frames in the first group address the “migration crisis” as a crisis in Arab countries and highlight the following: 1) the reasons for migration, such as terrorism, war, and poverty, or 2) the Western responsibility for economic problems and political conflicts in the Arab world. Both frames lead to the treatment recommendation to receive refugees for humanitarian reasons. The frames in the second group refer to a European crisis. They stress the following: 3) the conflicts between EU countries that undermine a united EU crisis management,

or 4) the humanitarian or administrative problems inside EU countries arising from the influx of migrants. These frames tend to blame individual EU countries for the crisis. At the same time, they appeal for a greater commitment from the EU and a coordinated EU asylum policy in their treatment recommendation.

The third group of frames is more concerned with the political and social situation in Germany. These frames provide support for, or criticism of the open-door policy. The supportive frames focus on the following: 5) societal challenges in integration and cohabitation, 6) motivational appeals for welcoming the refugees, and 7) problematizing the increase in populism and radicalism in German society. Frames that criticize the open-door policy are policy-related when they highlight 8) deficits in the German asylum law combined with appeals for restrictions to limit migration. Other critical frames focus more on the government's performance as a crisis manager and emphasize the following: 9) the open-door policy as political mismanagement and 10) administrative problems with the handling of the influx of migrants.

A frame was coded when at least two frame elements were addressed by a public speaker. In the press material, the broadcasts, and the speakers' statements within the broadcasts, all identified frames were coded. One frame could be coded several times in one broadcast if addressed by different speakers or by the same speaker in different statements. Coding was conducted by four coders who were trained for six weeks. The reliability coefficient for the key variables showed a sufficient level (for the frames: Krippendorff's $\alpha = .76$, and for public speakers: $\alpha = .83$). The reliability of the frames differed slightly among the materials under study (government communication: Krippendorff's $\alpha = .77$, newscast: $\alpha = .78$, talk shows: $\alpha = .76$, and satirical shows $\alpha = .74$). Coder training and reliability tests were based on the coding of 40 randomly selected broadcast segments and 10 pieces of government communication releases, all of which included a total of 164 frames.

5 Results

A total of 1459 frames were coded. German governmental communication consisted of officials' frames only ($n = 105$). Newscast frames ($n = 434$) stemmed from the newscast's editorial staff (37.6%) and external sources, who were most frequently representatives from the German government (17.5%) and non-governmental politicians (25.8%). In the talk shows, most frames ($n = 489$) were sponsored by non-governmental politicians (41.2%), civil society actors (16.8%), governmental politicians (11%), and journalists (9.6%). In the satirical shows, all coded frames on the "migration crisis" stemmed from the editorial staff members of the shows.

The findings revealed that before and after the incidents on NYE 2015, all the analyzed formats paralleled government communication by depicting the "migration crisis" as a crisis in Germany predominantly and as a European crisis secondarily (Table 2). The strong focus on Germany can be explained by political efforts to recognize problems that directly affected German citizens, the media indexing the policy debate (Bennett, 1990), and the media's tendency to domesticate global issues (Eide & Ytterstad, 2011). However, in doing so, the media tended to underemphasize the global dimension of the problem. This included Western responsibilities for economic problems and political conflicts in the countries of origin as well as the reasons for migration, which contributed to legitimizing the influx of migrants on humanitarian grounds. Domestication can also convey the misleading idea that the crisis could be solved in and by Germany.

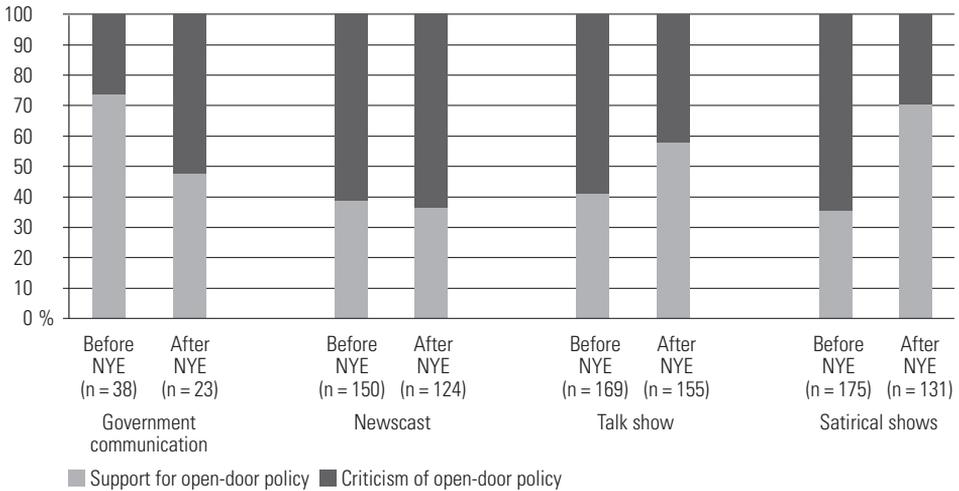
For the frame group *European crisis*, governmental communication and media coverage highlighted the crisis of the EU more often than the problems in individual EU countries. The frame *Crisis of the EU* stressed the need for a coordinated EU asylum policy and mainly attributed responsibility to the EU. From the German government's perspective, the frame allowed it to present itself as a European crisis manager and to externalize blame for the tense situation in Germany to other EU countries

Table 2: Frame groups in government communication and media coverage (in %)

	Government communication		Newscast		Talk shows		Satirical shows	
	Before NYE (n=62)	After NYE (n=43)	Before NYE (n=255)	After NYE (n=179)	Before NYE (n=266)	After NYE (n=223)	Before NYE (n=251)	After NYE (n=180)
Frame group: Arab crisis	10	7	14	10	11	10	9	4
Western responsibility	7	0	9	3	3	5	9	4
Reasons for migration	3	7	6	7	8	5	0	0
Frame group: European crisis	29	40	27	21	25	21	22	23
Crisis of the EU	18	26	18	18	23	19	17	22
EU country in crisis	11	14	9	2	3	2	4	2
Frame group: Crisis in Germany	61	54	59	70	64	70	70	73

Note: Differences in the sum are due to rounding. For the frame groups Arab crisis and European crisis, the table also discloses the values for the single frames.

Figure 1: Changes in support for and criticism of the open-door policy after NYE 2015



Note: Percentages for support for and criticism of the open-door policy result from the total of supportive frames (Integration and Cohabitation, We Will Manage It, Populism and Radicalism) and critical frames (German Asylum Policy, Political Mismanagement, Administrative Problems).

(such as Hungary and Poland) that prevented a common EU asylum policy. After NYE, disruptive events and decreasing public acceptance of the high migration influx put pressure on the German government to externalize the blame. Thus, the government placed an increased emphasis on the European dimension of the issue, which was

not paralleled to the same extent in media discourse.

Within the frame group *Crisis in Germany*, differences in support for and criticism of the open-door policy (as expressed in the respective framing of the “migration crisis”) became obvious between the periods before and after the NYE incidents (Figure 1). Consistent with policy chang-

es, the German government initially supported the open-door policy but was more ambivalent in the time after NYE [χ^2 (1, $N=61$) = 4.16, $p=.042$].

In contrast to the expectation in hypothesis 1, the media did not parallel governmental communication and showed no increased criticism after the NYE events compared to the time before. In the period before the NYE events, the analyzed media formats deployed frames that were in line with government communication and supported the open-door policy to the extent of 35% to 41% only. The media thus already had a stronger focus on critical counter frames before NYE, and media criticism of the open-door policy did not increase in the time after. While the newscast *Tagesschau* framed the “migration crisis” in a similar critical way during both periods under study, the share of support for the open-door policy increased significantly in the talk shows [58.1%; χ^2 (1, $N=324$) = 9.61, $p=.002$] and satirical shows [70.2%; χ^2 (1, $N=306$) = 36.29, $p=.001$] and now outweighed criticism. This finding contrasts with previous research that found strong media support for a welcome culture (Haller, 2017). Consonance in media criticism on the open-door policy, however, must be considered to have influenced the political agenda (Dekker & Scholten, 2017). Pressure from media coverage thus explains, to some extent, the switch in governmental communication from support for the open-door policy to ambivalence.

Hypothesis 2 is partly confirmed. This hypothesis proposes that, compared to news media, infotainment formats were more critical of the open-door policy before NYE and more supportive in the time after. However, the newscast and infotainment formats showed no significant difference in the extent of their support or criticism for the open-door policy in the period before NYE.² After NYE (and in accordance with H2), frames that supported the open-

door policy were more common in the infotainment media formats of talk shows [59%; χ^2 (1, $N=279$) = 13.08, $p=.001$] and satirical shows [70%; χ^2 (1, $N=255$) = 29.51, $p=.001$] compared to traditional newscasts (36%). Satirical shows also deployed a significantly higher share of supporting frames compared to talk shows [χ^2 (1, $N=286$) = 4.54, $p=.033$]. Satirical shows played their critical role in opposing governmental communication in both periods under study and by opposing news media discourse after the NYE events. In addition, the higher share of frames supporting the open-door policy after NYE demonstrates that the soft-news focus of infotainment is not related to stronger criticism in infotainment formats.

Differences in the framing of the “migration crisis” between the news and infotainment media and their relationship to governmental communication varied between the periods under study. Before NYE, the government’s communication aligned with the aim to legitimate the open-door policy (Table 3). Using the frame *Integration and Cohabitation*, the government met the German citizens’ concerns about the effects of migration on their daily lives. The frame *We Will Manage It* aimed at motivating citizens and claimed that German politics and society could successfully solve the crisis together. In contrast, the frame *Populism and Radicalism* criticized and warned of xenophobia and populism.

As anticipated by H3, the newscast, when expressing support for the open-door policy, tended to follow the government’s framing of the “migration crisis.” Contrary to expectations, the same also applied to the infotainment format of talk shows. Both formats ranked the government’s main frame *Integration and Cohabitation* as primary and the frame *We Will Manage It* as secondary. They reported on volunteers who were actively supporting the influx of migrants. The satirical shows, however, addressed the governmental frames to a lesser extent compared to the newscast and talk shows.³ Instead, satir-

2 The critical frames were addressed significantly more frequently than the supportive frames in the newscast [χ^2 (1, $N=150$) = 7.71, $p=.006$], the talk shows [χ^2 (1, $N=169$) = 5.69, $p=.017$], and the satirical shows [χ^2 (1, $N=175$) = 14.86, $p=.001$].

3 For the frame *Integration and Cohabitation*, the difference between satirical shows and talk shows [χ^2 (1, $N=344$) = 4.57, $p=.033$]

Table 3: Framing the migration crisis as a German crisis in government communication and the media, Sep 1–Dec 31, 2015 (in %)

	Government communication (n=38)	Newscast (n=150)	Talk shows (n=169)	Satirical shows (n=175)
Integration and Cohabitation	42	15	18	10
We Will Manage It	16	14	12	6
Populism and Radicalism	16	9	10	19
German Asylum Policy	16	20	11	3
Political Mismanagement	0	25	33	9
Administrative Problems	1	17	16	53

Note: Differences in the sum are due to rounding.

ical shows deployed the frame *Populism and Radicalism*, criticizing xenophobic attitudes in society more frequently than did the newscast [$\chi^2 (1, N=325)=6.54, p=.011$] and talk shows [$\chi^2 (1, N=344)=5.98, p=.014$]. In adopting this frame, satirical shows took a moral stance against growing xenophobia and right-wing violence. Hypothesis 3, which proposes that the infotainment formats criticized populism and xenophobia more frequently than did the news media, is thus confirmed from the findings on the difference between the newscast and satirical shows.

Regarding criticism of the open-door policy, policy-related criticism (expressed by the frame *German Asylum Policy*) was more frequently found in the analyzed newscast than in the infotainment formats. In contrast, criticism of the government’s general performance as a crisis manager (expressed by the frames *Political Mismanagement* and *Administrative Problems*) was more frequently found in the infotainment media formats. This difference proved to be significant between the newscast and talk shows [$\chi^2 (1, N=192)=5.45, p=.020$] as well as between the newscast and satirical shows [$\chi^2 (1, N=205)=28.45, p=.001$] and thus confirms hypothesis 4. However, *Political Mismanagement*, which criticized the government’s crisis management and challenged its reputation, was the most frequently stressed frame in both

the newscast and talk shows. In talk shows, this frame included, for instance, warnings of symbolic effects because the open-door policy could be perceived as an invitation to people in Arab countries to migrate to Germany. In contrast to the newscast and talk shows, the satirical shows treated the frames *German Asylum Policy* and *Political Mismanagement* only as side aspects of the debate and, instead, more dominantly focused on *Administrative Problems*.⁴ In doing so, they resisted criticizing the principle of the open-door policy but highlighted fixable bureaucratic problems.

After the NYE incidents, government communication switched from promoting a welcoming of refugees to a framing that was more suitable for legitimizing restrictions in migration policy (Table 4). Therefore, the government deployed the frames *German Asylum Policy* and *Integration and Cohabitation*. The combination of these frames resulted in promising restrictive asylum policies as a reaction to societal problems, while simultaneously appealing to peaceful cohabitation. This indicated an attempt to calm the debate by promising a decrease in the migration influx.

Regarding support for the open-door policy, all the analyzed media formats, however, paralleled the government communication by giving much attention to the frame *Integration and Cohabitation*. While the frame *We Will Manage It* lost weight in government communication and the an-

proved significant. Regarding the lower employment of the frame *We Will Manage It* in the satirical shows, the difference proved to be significant in comparison to the newscast [$\chi^2 (1, N=325)=6.43, p=.011$] and the talk shows [$\chi^2 (1, N=344)=4.72, p=.030$].

⁴ The satirical shows used the frame *Administrative Problems* significantly more frequently than the newscast [$\chi^2 (1, N=325)=46.47, p=.001$] and the talk shows [$\chi^2 (1, N=344)=52.28, p=.001$].

Table 4: Framing the migration crisis as a German crisis in government communication and the media, Jan 1–Apr 30, 2016 (in %)

	Government communication(n=23)	Newscast (n=124)	Talk shows (n=155)	Satirical shows (n=131)
Integration and Cohabitation	35	22	33	32
We Will Manage It	9	7	7	0
Populism and Radicalism	4	7	19	38
German Asylum Policy	39	13	5	1
Political Mismanagement	0	35	20	9
Administrative Problems	13	16	17	20

Note: Differences in the sum are due to rounding.

alyzed media formats, the satirical shows paid particularly strong attention to the frame *Populism and Radicalism*, which was found significantly less frequently in the newscast [$\chi^2 (1, N=154)=10.10, p=.001$]. The satirical shows thereby acted to criticize the xenophobic tendencies among the German population. To a lesser extent, the talk shows also pointed out the social divide on the issue of migration, referring to the frame *Populism and Radicalism*.

However, the second government frame, *German Asylum Policy*, which promised legislative restrictions to liberal migration policy, was deployed to a rather low extent in all formats. As expected in hypothesis 4, this policy-related criticism was more frequently deployed in the newscast compared to the infotainment media formats, which had a stronger focus on criticism of the government’s performance as a crisis manager. The difference is significant in the comparison between the newscast and satirical shows [$\chi^2 (1, N=118)=6.63, p=.010$], but not between the newscast and talk shows. Therefore, hypothesis 4 is only partially confirmed. The frame *Political Mismanagement* ranked first in the newscast and second in the talk shows. This frame, however, registered a comparably low level in the satirical shows, where *Administrative Problems* remained the most frequently used counter frame. Consistent with a previous study (Nitsch & Lichtenstein, 2019), the satirical shows thus also resisted denouncing the open-door policy as political mismanagement in the time after the NYE events.

6 Discussion and conclusion

The comparison between the framing of the “migration crisis” before and after the incidents on NYE revealed changes in governmental communication. Still, it provided little evidence for the interpretation of NYE as a turning point in the media’s evaluation of the open-door policy. This can be stated even though previous studies found a decrease of support for migration and growing attention toward less vulnerable groups of migrants in the media following the NYE events (Haller, 2017; Vollmer & Karakayali, 2018).

The findings also contradict claims that suspected the media of a state-conforming coverage of the “migration crisis.” Compared to governmental communication, the media followed a separate frame agenda that to a large extent criticized the open-door policy and exercised pressure on governmental communication. The strong presence of counter frames that criticized the open-door policy can be explained by the media’s focus on the “migration crisis” as a domestic crisis and not a foreign one. Thus, journalists were likely to include midlevel sources instead of relying only on governmental frames (Allen & Blinder, 2018). In addition, the governmental frames were contrasted by visible administrative problems. This finding of strong media criticism, particularly before the NYE events, is well in line with research on the media coverage of migration (Roggeband & Vliegenthart, 2007; van Gorp, 2005; Vukov, 2003), although it contradicts to some extent prior research on the crisis discourse on migration in

Germany (Haller, 2017; Hemmelmann & Wegner, 2016). This can be explained by methodological considerations. Unlike previous analyses on keywords and the overall tonality of coverage, this study provides a more in-depth systematic analysis, taking all frames deployed in a media piece into account.

For the comparison between media formats, this study showed that infotainment formats contributed to media discourse on the “migration crisis” with a frame agenda that deviated from the newscast. While this contradicts the idea of uniform media coverage in public broadcasting, the findings provide little support for the assumption that news and infotainment media formats systematically differed in their cooperative or critical role with respect to the state. In particular, the newscast *Tagesschau* did not prove to fulfill the expected cooperative function but demonstrated criticism of the open-door policy before the incidents on NYE. In line with the indexing thesis (Bennett, 1990), this can be explained by a lack of elite consensus in politics, as parties were divided about crisis management, and thus, provided critical orientation.

As expected, news and infotainment formats were found to deviate in the way they criticized the open-door policy. Compared to the infotainment media formats, the newscast emphasized policy-related criticism more frequently. This is in line with a stronger focus on hard news, while infotainment media have a stronger emphasis on conflict, emotion, and human interest (Baum, 2007; Reinemann et al., 2012), leading them to put a spotlight on the government’s general performance as a crisis manager. In doing so, the talk shows constantly presented competing frames and highlighted conflict, with a strong focus on political mismanagement. Thus, satirical shows took a critical stance against governmental communication – but not against the open-door policy – and tended to oppose central frames in the newscast and, to some extent, in the talk shows.

This study extended the spectra of media that are usually analyzed in research

on media–politics relations. Nevertheless, the sample showed only a non-representative portion of the German media system, and most importantly, the plurality of online media was not represented. A further limitation concerns the selected time frame, which is only relevant to two major events in the “migration crisis” from a German perspective: the welcoming of refugees and the incidents on NYE. Both events dominated the crisis discourse for long periods. However, how other events, such as terrorist attacks or violent incidents against migrants, were related to even slight changes in the framing of the “migration crisis” was not examined. For such a detailed analysis of changes in the use of frames over time, a more extensive data collection would be required.

The analyzed material was selected for two distinct periods divided by the key event of NYE 2015. However, the material covered the periods under comparison differently, varying between 30 days and both periods as a whole. This methodological ambiguity was employed to guarantee a sufficient number of frames for each investigation unit. However, the overall design allowed for a comparison of media formats and the media and policy agenda, but not analysis of causalities between them. Hence, further research should focus more on the interactions between government and media communication. Future studies should also include strategic communication from civil society organizations and other interest groups, such as *Pro Asyl* and *Pegida*.

Despite these limitations, the findings revealed that news and infotainment formats created a critical media environment in which the German government did not achieve support for its open-door policy. The media acted in line with their normative task to scrutinize politics with counter frames and to hold the government accountable (Christians et al., 2009; Entman, 2004). As all the analyzed media formats were from public broadcasting, this contradicts claims that public broadcasting serves as mere conformist mouthpieces of the state. In addition, the findings showed that different infotainment media formats

displayed their own accounts of crisis discourses and political events. This calls for further discussions regarding a more systematic differentiation of the impacts of infotainment media formats on public opinion formation in an increasingly complex media environment.

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Conflict of interest

The author declares no conflict of interests.

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Appendix

Table A1: Media material under study

	Reach (in millions)	Market share (in %)	Channel
Newscast			
<i>Tagesschau</i> , 8 p. m.	4.99	17.9	Das Erste
Talk shows			
<i>Anne Will</i>	1.47	10.2	Das Erste
<i>Maybrit Illner</i>	2.49	12.1	ZDF
Satirical shows			
<i>heute-show</i>	3.46	14.4	ZDF
<i>Die Anstalt</i>	2.29	11.4	ZDF
<i>Neo Magazin Royale</i>	0.12	1.4	ZDF

Note: Numbers refer to the year 2015 (source: www.quotenmeter.de). For *Neo Magazin Royale*, the numbers were available only for the period of January to June 2015; *Neo Magazine Royale* reaches only a small audience via TV but is highly viewed via the online ZDF Mediathek.

SComS

Thematic Section

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Critical perspectives on migration in discourse and communication: An introduction

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While these lines were written, Taliban were conquering Afghanistan, establishing a regime of terror in the country, while concurrently provoking a wide conflict in the Western public sphere about responsibilities and consequences of this situation. More specifically, Europe witnesses a racist and xenophobic wave of discourses against a new possible escape of refugees toward Europe; presently such discourses abound in politics and the media. It is more than a truism nowadays that, in crisis-stricken Europe, there is an increasing politicization of migration, which takes place against the background and mutual overlapping of diverse crises. More specifically, migration has become a focal and quite polarizing issue in the European public sphere especially since the numbers of refugees, escaping from conflict territories of the Middle East (e.g., Syria), crossing the Mediterranean, dramatically increased starting in 2014 (Bevelander & Wodak, 2019a). The so-called “refugee crisis,” as this movement was portrayed by mainstream media and powerful political figures in Europe (Krzyżanowski, Triandafyllidou, & Wodak, 2018), contributed to social and economic tensions (such as the Eurozone “debt crisis”) that took place in the European Union and played into Brexit that followed.

Against this backdrop, refugee and migrant populations were met with solidarity by groups of European citizens and NGOs while, simultaneously, they were scapegoated by extreme right-wing voices and attacked both physically and symbolically, revealing the intensity of

racist hatred in the European Union. The images of citizens, for example, in Lesbos island, Greece, rescuing and hosting refugees who were fleeing from the Turkish coast, and the pro-refugee manifestations yielded to a wave of exclusionary discourses such as the right-wing populist UKIP’s anti-EU campaign, which was founded on an anti-migration sentiment and favored by mainstream British media (Cap, 2018). Moreover, fences were raised among EU member-states (Rheindorf & Wodak, 2018), the debate on the Schengen area was thrown in turmoil (Boukala & Dimitrakopoulou, 2018), and the essence of the project of the European integration was put to the test (Bevelander & Wodak, 2019b) due to the rise of what has been called *politics of fear* (Wodak, 2015).

As a consequence, the “refugee crisis” and the related developments in the public sphere attracted huge multidisciplinary research interests in the fields of communication and discourse studies (Balabanova & Trandafoiu, 2020; Krzyżanowski, Triandafyllidou, & Wodak, 2018; Musolff, 2017; Viola & Musolff, 2019; among others). To name but a few of the recent studies on the topic, scholars focused on analyzing dehumanizing metaphors (e.g., Musolff, 2015) such as “flows / tides of migrants,” as a means that favor the exclusion of the migrant populations from the host societies. Moreover, in some cases, scholars have shown how discursive constructions of migrant and refugees contributes to the construction of explicit and implicit argumentation and consequently justifying racist exclusionary views (e.g., Serafis,



Greco, Pollaroli, & Jermini-Martinez Soria, 2020a, 2020b; Serafis, Raimondo, Assimakopoulos, Greco, & Rocci, 2021).

This Thematic Section aims to deepen the relevant scholarly discussion about the issues highlighted before by bringing to the fore critical cutting-edge research from discourse and communication studies on migration in different European contexts where the so-called “refugee crisis” played out. In particular, the papers included in this Thematic Section represent different scholarly perspectives from a multidisciplinary mosaic of approaches, with a particular focus on Spain, Italy, Greece, and Germany. In many ways, the papers expand previous research by focusing, for example, on migration in relation to the ongoing COVID-19 public health crisis, or on the (re-)emergence and the ultimate naturalization of extreme right-wing populist forces and voices in different EU settings, as well as the time frame to understand how migration is represented in discourses after the 2015 peak period.

Focusing on Spain, in her paper, “Refugees, coronavirus and the politics of representation in the Spanish press,” Alicia Ferrández-Ferrer cross-examines the migration issue in relation to the COVID-19 pandemic outbreak. The author focuses on the Spanish mainstream press. More specifically, she analyzes news articles published by the Spanish newspapers *El País* and *El Mundo*, showing that representations of migrants have changed owing to the COVID-19 pandemic. In particular, the author shows that there are shifts toward a representation of migrants and refugees as victims or as a threat, but also a portrayal of migrants as necessary and as active agents in the context of a global emergency.

Examining political discourse in the Italian context, in his paper “Emergenza sanitaria, emergenza immigrazione. Il discorso anti-immigrazione di Matteo Salvini,” Dario Lucchesi analyzes right-wing populist discourse of Matteo Salvini on social media, with a particular focus on migration (March 2020–March 2021). The author synthesizes quantitative analysis and critical discourse analysis to study Salvini’s posts and user comments.

He identifies the linguistic strategies that contribute to the construction of a sense of emergency and reinforce the process of “securitization” of national borders and the re-legitimation of national identities. The author shows that Salvini systematically organized the migratory narrative on negative campaigning, blaming political opponents, and recontextualized the moralization of borders.

Turning to the Greek context, in the paper “Far-right discourse as legitimacy? Analysing political rhetoric on the ‘migration issue’ in Greece,” Salomi Boukala follows a discourse-historical approach (DHA) to critical discourse studies (CDS) to show the normalization of far-right political rhetoric on the migration issue. She does so by analyzing statements from mainstream political representatives, namely the current Greek prime minister, Kyriakos Mitsotakis, and political figures from the ruling political party *New Democracy*. In particular, the author uses an argumentative-based DHA approach, considering the argumentative schemes of Aristotelian *topoi* and the study of fallacies to investigate how the leadership of the Greek government justified its political agenda on security, law, and order, thus underpinning a far-right rhetoric.

Within the same national context, in their paper “From the illegal migrant-criminal to the illegal migrant-invader: Critical analysis of the semantic change of the Greek term λαθρομετανάστης ‘illegal migrant,’” Nikos Stamatidis, Argiris Archakis and Villy Tsakona provide evidence from the analysis of the Hellenic Parliament Proceedings where the term λαθρομετανάστης “illegal migrant” is used. Following a critical discourse-analytical perspective and employing the principle of the interplay between macro-level dominant discourses vs. micro-level discursive choices and strategies, the authors trace the semantic trajectory of such a term, showing how this was re-contextualized in relation to the hegemonic national-racist discourse of the 1990s, in which migrants were perceived as criminals. Moreover, they examine how the re-emergence of the older racist use of the term in question as a reaction against

the guidelines of political correctness is anew connected with national-xenophobic discourse, that tends to frame migrants as invaders and a national threat.

Finally, in their paper “The ‘refugee crisis’ as an opportunity structure for right-wing populist social movements: The case of PEGIDA,” Marco Bitschnau, Dennis Lichtenstein and Birte Fähnrich focus on the strategic communication of the right-wing PEGIDA movement in Germany. In particular, they unveil the frames and master frames of the PEGIDA movement and the role of the 2015 “refugee crisis” in shaping them. They employ a qualitative content analysis of speeches held at PEGIDA rallies between 2014 and 2016. Their paper shows that PEGIDA employed the alleged “Islamization of Europe” as the only master frame prior to the refugee crisis. They also demonstrate the emergence of a new master frame, the “Perils of Asylum.” This master frame arises during and due to the “refugee crisis” and incorporates elements of the previous Islamization master frame. The crisis is an opportunity structure through which PEGIDA’s message can be modified and updated – but this requires that the old and the new master frame can be aligned with each other. Through that prism, the authors enable us to get to a better understanding of the “crisis” as an opportunity structure for right-wing populist social movements to deepen their roots in German society and broaden their audience.

The different papers in this Thematic Section offer, thus, perspectives on micro and macro discursive and communication strategies regarding events related to international migration and their political interpretation in communication. We hope the readers of SComS will enjoy reading context and country specific analyses informed by different approaches offered by this collection of papers.

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Refugees, coronavirus and the politics of representation in the Spanish press

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Abstract

COVID-19 outbreak brought important consequences for global mobility. Border closures throughout the world meant the interruption of migratory processes, both forced and volunteer, leaving millions of people stuck on the way. This article analyses the news articles published by the Spanish newspapers *El País* and *El Mundo*, to find out if the pandemic has meant a change in the politics of representation of migration and refuge in the Spanish media during the first months of 2020. The qualitative content analysis focuses on the main sources and predominant themes in media coverage, as well as the labels applied to migrants and refugees in different contexts. The results show that changes have taken place due to the pandemic, with new nuances in the representation of migrants and refugees as victims or as a threat, but also giving space to new types of representation: migrants as necessary, and as active agents in the context of a global emergency.

Keywords

COVID-19, migration, refuge, qualitative content analysis, Spain, news articles

1 Introduction

On February 14 2020, the Spanish regional newspaper *Diario Vasco* published a news article titled “Primer paso hacia una vida digna” (“First step towards a dignified life”) (Rodríguez, 2020). It chronicled the arrival at the Sicilian Port of Messina of the rescue ship *Aita Mari*, which had rescued 158 people who had been travelling on two small boats across the Mediterranean waters. It was not unusual news. Since 2015 the Spanish media have reported, almost daily, on people who, fleeing war and devastation in Syria, Afghanistan and other countries, have started the long journey to Europe by land or sea. But the arrival of the *Aita Mari* was accompanied by a greater than usual police and medical deployment:

A large police and medical contingent awaited them on the dock. Sanitarians covered from top to bottom with personal protective equipment (PPE) and masks, boarded the ship together with the Italian authorities to conduct an initial health assessment of the rescued

and the crew before their disembarkation. The measures were extreme this time for fear of coronavirus contagion risk. (Rodríguez, 2020)¹

This was the first time the words *refugee* and *coronavirus* appeared together in a news story in Spain. Since then, many more news articles have been published about refugees, coming from different nations, arriving or settled in different countries, but with something in common: the novelty, fear and helplessness that the recently appeared SARS-CoV-2 coronavirus has brought with it. Two crises – both real and politically constructed –, the health emergency and the so called “migration crisis”, overlapped in 2020 with terrible consequences.

This article addresses how the terms *refugee* and *coronavirus* are being linked in the Spanish press, and the connotations and meanings that this conveys, to discover the politics of representation of refugees

¹ All original quotes in Spanish have been translated by the author.



and migrants in this new social and health context.

The politics of representation refer to the competition among groups over what is to be taken as the correct, appropriate or preferred representation (Wenden, 2005). Several social actors participate in this competition, although not all of them have the same public influence. As Bourdieu points out, symbolic power and public influence are characteristic of three relevant actors: politicians, researchers and the media. From different fields, these actors struggle to impose a legitimate vision of social reality (Bourdieu, 2005). But their discourses do not reflect the world, on the contrary, they construct it providing a framework from which to interpret all that happens in it (Hall, 1997).

In this regard, with the increasing mediatization of societies (Hjarvard, 2008), media have increased their relevance as the space where social and political issues are articulated and negotiated and struggles over hegemonic meanings take place, replacing the physical public sphere described by Habermas (2001). Today, being present in the media is proof of existence, but this presence can be constructed in different ways, as the public sphere provided by the media is also a space of struggle “over the imposition of the dominant principle of vision and division” (Bourdieu, 2005, p. 36). Discourse plays a significant role in this struggle for power, both as an instrument for the reproduction of social inequality and as a means for social change, through the construction of imaginaries that display a specific representation of reality (van Dijk, 2003).

Media discourse sinks its roots into the collective imaginary of a society, so prejudices, stereotypes and historical events guide their (re)construction of reality and feed social representations about it. Social representations are, first of all, cognitive and emotional processes that produce meaning, symbolic and dynamic realities. They also act as organising schemes for reality. Finally, social representations ensure the permanence and consistency of collective beliefs (Mannoni, 2001, p. 61). As Santamaría (2002, p. 11) suggests:

Representations [...] are a certain way of conceiving reality, in its cognitive sense but also constitutive and structuring sense. Representations are part of social relations, they are both their cause and their consequence. It is necessary to emphasize that these representations are collective not only because they are shared by the members of a group, but because they are socially elaborated, maintained and transformed within social interaction, and because, at the same time, they have the power to structure these social relationships.

Thus, social representations are at the same time socially constructed products and builders of social thought. These representations are not static but can change depending on the circumstances in a given context and the perspective of the observers. The COVID-19 pandemic has brought with it a new social situation, so extraordinary that it could have changed our perspective and the representations of the social world, including our understanding of global mobility (Fernández-Reino, Sumption, & Vargas-Silva, 2020). Has this new context changed the politics of representation of migration and asylum? What new imaginaries are built around migrants and refugees in the media? A qualitative content analysis of two mainstream Spanish newspapers will try to answer these questions.

Next two sections provide an overview of the media coverage of migration and refuge in Spain, as well as a summary of the consequences of the pandemic on global mobility and how it affected forced and economic migrants. Then, the methodology used in this research will be addressed, based on a compilation and qualitative content analysis of news articles published in the two leading Spanish newspapers during the first months of the pandemic (from February to May 2020). Finally, the results of this qualitative content analysis will be presented, regarding the labels, main themes and sources used in media coverage. Taking these elements into account, four types of media representation of migrants and refugees arise, as will be explained in the last section of the article.

2 Immigration and asylum in the Spanish media

The accession of Spain to the European Community (EC) in 1986 brought about a radical change for the country, which went from being an emitter of population – mainly to the American continent and northern Europe – to becoming a receiver of immigrants. Joining the EC also forced the formulation of the first Aliens Law,² the closure and surveillance of borders, and the imposition of visas to enter and stay in the country. All this led to a new reality: that of the arrival of people who, jumping over the fence or by sea on board small fishing boats (known as *cayucos* and *pateras*), tried to reach the Spanish territory. Separated by 14 km from Africa, Spain has become one of the preferred routes (the Western Mediterranean route) of sub-Saharan migrants to reach the European continent. According to International Organization for Migration (IOM)'s Flow Monitoring website,³ 6815 people arrived in Spain by sea during the first six months of 2020, a small amount if compared to the figures of previous years, as the coronavirus pandemic interrupted mobility at a global scale.

A tightening of migration policies has been Europe's reaction to the arrival of immigrants, with measures such as the strengthening of external borders with the erection of high fences – such as those of Ceuta and Melilla in Spain –, military surveillance and sophisticated technology to detect and reject the entry of irregular migrants. But this intensification of border control has transformed the Mediterranean Sea into the biggest cemetery of the world, with thousands of deaths every year. According to IOM's Flow Monitoring website,⁴ 3793 deaths were recorded in

Mediterranean waters in 2015, coinciding with the massive exodus towards Europe due to the Syrian Civil War. But deaths have continued until today: In 2020, 1419 people died in the Mediterranean Sea trying to reach Europe.

Since 2015, Syrian refugees leaving from Libya have reached Europe via the Central Mediterranean route, arriving in Italy (mainly Lampedusa), whereas those departing from Turkey did so via the Eastern Mediterranean route, reaching Greece (mainly Lesbos). Consequently, Spain remained a witness to this crisis from a distance, experiencing the Syrian refugee crisis as a relatively foreign event (Seoane, 2017), more present in the media than in the Spanish territory. Psychological distancing also had to do with the national origin of most migrants and asylum seekers in Spain, mainly from Latin America. For example, in 2019 most asylum seekers came from Venezuela (40 305), Colombia (28 880), Honduras (6730), Nicaragua (5840) and El Salvador (4715) (Eurostat, 2020). Their national origin does not coincide with that of the protagonists of the “refugee crisis” in 2015, one more reason why Spain witnessed this crisis as something alien and far removed from its daily reality. Only the images of the young Aylan Kurdi, who drowned in his voyage from Turkey to Greece, seemed to awaken Spain to the harsh reality. Some Spanish local governments (Madrid, Barcelona, and Valencia) offered to host refugees after that event, but disputes over refugee quotas in the European Union (EU) caused a delay in the process that resulted in very few refugees finally arriving in Spain.⁵

The Spanish press started reporting on the immigration flow to the country in the middle 1980s, parallel to the accession of Spain to the European Commission (EC) and its status as the Southern border,

2 Ley Orgánica 7/1985, de 1 de Julio, sobre Derechos y Libertades de los Extranjeros (Organic Law 7/1985 of July 1, on Rights and Freedoms of Foreigners).

3 IOM Flow Monitoring website, “Arrivals”, <https://migration.iom.int/europe?type=arrivals>.

4 IOM Flow Monitoring website, “Dead/Missing”, <https://migration.iom.int/europe?type=missing>.

5 In 2015, the member states of the European Union promised to relocate and resettle 160 000 asylum seekers in two years, a term that expired in September 2017. By the end of 2018, the Spanish Government, which promised to host 17 337 refugees, had only received 2892 people, 16.6% of the agreed quota (Europa Press, 2018).

combining two types of representation of migrants: as victims, or as a threat, and always as *Others* (Retis, 2006; Rodrigo-Alsina, Pineda, & García-Jiménez, 2019). Although the main ports of entry for immigrants in the territory have always been international airports or land borders, the media focused on the dramatic Mediterranean Sea crossing, with daily news on how many had reached the coasts. This reporting emphasised “they were too many people” and assumed them to be Muslims, so culturally different that they were “non-integrable” others. It thus generated social alarm, by assuming that irregular migrants arriving by sea and also by climbing over the border fences of Melilla and Ceuta were “invading” Spain (El-Madkouri, 2006, p. 110).

The discursive strategies used by the Spanish media to cover this information turned immigration into “a disturbing and worrying phenomenon” (Santamaría, 2002, p. 119). One of these media strategies consists of counting, registering and recording data and statistics on immigrants to produce the effect of truthful information. This allows the media to transmit the idea of knowledge and control of the situation, and, together with generating social alarm, legitimises the decisions and interventions developed by the political leaders (Santamaría, 2002).

A second strategy has to do with the use of language, and more specifically with the use of metaphors that contribute to the perception of immigration as a problem. By using metaphors referring to runaway nature, water or disease, and military vocabulary, immigration is presented as a great destabilising factor (Musolff, 2017). This way the media tend to associate immigrants with the social problems that cause greater concern, such as the economic crisis, unemployment, access to housing, criminality, poverty, ghetto formation, urban deterioration; in short, with the problems of social coexistence (Retis, 2006; Rodrigo-Alsina et al., 2019).

One more general practice in the Spanish media consists in providing information without delving into it. As García, Granados and Capellán (2003, p. 104) sta-

te, “the cultures and countries where immigrants come from, the socio-historical circumstances that cause migration, the dependency relationships between sending and receiving countries are systematically ignored”. This way, the media find an easy explanation as to why people migrate and the problems and difficult situations that migrants deal with in Spain: Immigrants and their native cultures are to blame for their difficulty in adapting to the norms, values and dominant customs, as well as for the distrust that their excessive and strange presence causes in the native population (Santamaría, 2002, p. 131). The need for the host society to actively participate in this integration process is rarely debated.

Finally, the media frequently highlight people’s nationality even when it is a secondary fact, above other issues of equal or greater relevance to the understanding of the news. When the information is related to criminality, the link between nationality and crime becomes especially dangerous (Vázquez, 1999), as the media tendency to homogenising under national labels contributes to the negative stereotyping and stigmatisation of the whole community.

Compared to economic migrants, reporting on refugees and asylum seekers is slightly less negative, although this depends on their place of origin. In the context of the so-called “refugee crisis” (2015–2017), the research by Durán (2015) on media coverage of refugees arriving on the Italian island of Lampedusa reveals that those arriving from Africa were considered as a “threat” rather than as “victims”. On the contrary, those arriving from Syria were referred to as “refugees” and “people”, creating “a sense of identification with refugees and their struggles” (Hoyer, 2016, p. 27). In addition, the work by Seoane (2017) analysing the Spanish newspapers *El País* and *El Mundo* reveals that news reporting on the refugee crisis had refugees as the most frequently cited source in these newspapers. Also, international agencies and NGOs were cited regularly, whilst official and government sources were almost absent. In his study, both newspapers framed refugees most-

ly as victims rather than as a threat, “and wondered who was and who should be responsible for dealing with this humanitarian issue” (Seoane, 2017, p. 277).

Some years have passed since the start of the “refugee crisis”, and the situation is far from improving in Syria and Afghanistan, as well as in other regions of the planet. And meanwhile, people continue to arrive at the gates of Europe, dreaming of a better life. The crowded refugee camps have multiplied, while the European governments cannot seem to agree on the quotas for migrant distribution. Furthermore, the Common European Asylum System (CEAS) has been tightened, making access to European territory even more difficult, establishing the requirement to apply for asylum in the first country that is reached, lengthening the process, and giving full recognition only to a minimal portion of all asylum applications. Along with the new fences and borders, alarming racist and hateful discourses were disseminated (see Assimakopoulos, Baider, & Millar, 2017; Musolff, 2017) once more giving rise to moral panics (Cohen, 1972), fed by the extreme-right parties across Europe.

3 Migration and coronavirus

At the end of December 2019, China reported to the World Health Organization (WHO) the outbreak of a new coronavirus that caused respiratory distress and pneumonia. A mandatory quarantine was decreed in Wuhan, Hubei’s capital, locking down 11 million inhabitants. A month later, on January 30, the WHO declared the Public Health Emergency of International Concern (PHEIC) in the face of the rapid expansion of the coronavirus, with the aim to increase coordination among all national health departments in the world. At the end of February, the WHO raised the risk of a global spread of coronavirus to “very high” and urged governments to take all necessary measures to be prepared for the arrival of the virus and, most urgently, contain its expansion. But it was impossible to put borders to the virus. Our current way of life, characterised by massive pop-

ulation movements, made it impossible. Tourism, business trips, studies abroad, migratory movements, forced displacements, all contributed to the fact that, very soon, the world shared a common, invisible and, in many cases, lethal enemy.

By May 2020 all countries in the world had imposed some sort of COVID-19-related travel restrictions (UNWTO, 2020a), causing unprecedented disruption to migrants and refugees. Border closures had serious consequences, with significant implications for human rights (IOM, 2020c). First of all, asylum seekers were denied access to safe territories where they could ask for their refugee status recognition. Many were unable to leave their countries, remaining at risk of violence, abuse, persecution and even death. Economic migrants were affected by border closures as well, being unable to depart for their planned migration journeys. Consequences were acutely felt in the economy of destination countries – where migrants were needed to carry out agricultural tasks during harvest seasons –, and the home countries – frequently highly dependent on migrants’ remittances (IOM, 2020d).

Border closure also had an impact on those who were already in transit or in their destination countries, especially for the most vulnerable, who have no access to social protection and health care, and who have also faced job loss, xenophobic racism and detention risk, while being unable to return home. On the other hand, refugees and internally displaced persons (IDPs) in camps or camp-like settings were subject to cramped, poor living conditions, that ignored both physical distancing and the required hygiene measures to avoid contagion, and put them at high risk of developing other contagious diseases. Finally, border closures made it difficult for them to return to their countries of origin, resulting in large numbers of migrants being stranded around the world (Sanchez & Achilli, 2020).

But travel restriction was only one of the pandemic dramatic effects on migration and mobility systems. There are other immediate effects and also those that will affect migrants, refugees and asylum seek-

ers worldwide in the intermediate and long term.⁶ As usual, the most vulnerable have been those most affected by COVID-19, including migrants and refugees in different settings. Even though some countries – Italy and Portugal – started regularisation programmes for irregular migrants, so they could access social protections (such as health services or food and shelter support), they were temporary and only for migrants working in specific sectors (basically, agricultural and domestic workers) (Vargas, 2020).

Legal or irregular migrants have been on the frontline: health care workers, senior care and childcare workers, domestic workers, transportation workers, seasonal agricultural workers, etc. These jobs have been called 3D jobs: dirty, dangerous and demeaning. But COVID-19 pandemic proved they are also essential. This reveals that migrants play a key role in destination countries' societies, although their legal status and discriminatory practices keep them in a very vulnerable position (IOM, 2020a). The pandemic has also brought about racism and discrimination against migrants. Not only Chinese people but every migrant has been blamed as responsible for the coronavirus spread.

Finally, COVID-19 may have been used to further “securitise” migration and asylum seeking. National governments seem to focus on border control and security, purportedly to prevent coronavirus spread, but restrictions imposed today may become permanent for migrants and asylum seekers. However, the pandemic has also drawn attention to the fact that migrants are vital to many sectors in developed countries, and some countries have granted flexibility on immigration processes (IOM, 2020b). So, although it is still early to draw conclusions, we could be witnessing a change in European immigration policies.

4 Methodology

To find out changes and continuities in the politics of representation of migration and refuge, a qualitative content analysis was performed. The sample of news was selected through the daily press compilation carried out by the Observatory for Media Diversity (Observatorio de la Diversidad en los Medios, ODM, for its initials in Spanish).⁷ The ODM database was searched by entering the words *refugee* (*refugiado*) and *coronavirus* in the search engine. These two keywords were selected from among others after careful consideration. In the Spanish media the words *refugee* (*refugiado*) or *asylum seeker* (*demandante de asilo*) are less frequently used than *immigrant* (*inmigrante*) or *migrant* (*migrante*) (Berry, García-Blanco, & Moore, 2015), and point to a specific type of migration. As the term *refugee* tends to co-occur with *migrant* and *immigrant* in media coverage, it was selected to include news articles which took into account all types of migration, both forced and volunteer. In a similar vein, *coronavirus* is preferred by the Spanish media, over others such as *SARS-CoV-2* or *COVID-19*, and for this reason was chosen as the second keyword.

The date of the first published news article was taken as the starting point (February 14 2020) to demarcate a period of one hundred days for the search (May 24 2020). This period was chosen because it was a time when misinformation about the disease caused by the coronavirus, its modes of transmission and the symptoms with which it occurred, prevailed around the world. In this context, political and media discourses could significantly influence public opinion.

The search yielded a result of 263 news items published in 17 different newspapers. After reviewing the headlines, 9 repeated news items were removed, resulting in 254 news stories being finally collected.

6 See IOM COVID-19 Analytical Snapshots, available at <https://www.iom.int/es/migration-research/covid-19-analytical-snapshot>.

7 The ODM database is available to researchers, journalists, NGOs, and general public interested in the media representation of issues related to ethnic and cultural diversity. It can be consulted at <http://medios.mugak.eu/>.

This article focuses on the news articles published by the online version of *El País* and *El Mundo*, the two most widely read newspapers in Spain, with 1 004 000 and 657 000 readers respectively (AIMC, 2020). These media have a different ideological stance, *El País* being a left-wing newspaper, and *El Mundo* presenting a right-wing ideological position.

During the period considered, *El País* published 22 news articles that included the selected keywords, while *El Mundo* published 8 news articles. The news articles compiled were systematised in a database for better treatment, and were analysed in order to determine the politics of representation of refuge and migration during the pandemic. Some questions guided the analysis: How are migrants and refugees represented in the Spanish print media in times of the pandemic? Which words and semantic fields are used to report about them? Do they have a voice? Who are the key sources? What are the main themes covered? All these questions are relevant to understand the ideologies that underlie media discourses.

5 Labels, main themes and sources in media coverage

Immigration and asylum are amongst the topics that generate the most social debate, with mixed positions regarding the benefits or problems they can create, and the rights or duties that should be granted to those who leave their homes and countries to settle amongst us. Furthermore, it is, of course, a political issue, often used by political parties of all sides to gather support (votes) and to attack or question their opponents. The way in which migrants, refugees and asylum seekers are represented in the media therefore becomes extremely important. One element to be considered is the use of words or labels used by the media to name people on the move. Sajjad (2018) examined the complex world of labels deployed for migrants, and concluded that they contribute to their identification as social, cultural, and medical “threats”, “victims” and, increasingly,

a “security problem”. This polarised representation leads to the affective mobilisation of the public in two opposite directions: fear and compassion (Rizo, 2011), but not to a calm, well-founded, comprehensive understanding of the causes and consequences of global mobility, and how it responds to the colonial and imperial European history and the intrinsic demands of the capitalist socioeconomic model.

The conducted qualitative content analysis shows *El País* and *El Mundo* use the words *migrant/immigrant* and *refugee/asylum seeker* in different ways depending on the geographical context. While reports about the Rohingyas in Asia or refugee camps on the Greek frontier use the word *refugee*, this term is rarely used when referring to the Spanish context. For example, one of the articles described people on the Greek frontier as “refugees”, whilst those arriving via the Central and Western Mediterranean routes were defined as “irregular immigrants” (Abellán, 2020).⁸ When information concerns the national context, the two newspapers use the labels *immigrant* and *refugee* together, making no attempt to specify what each term refers to. But the use of words matters. As Sajjad (2018, p. 41) states, whilst some labels “offer a degree of protection against refoulement, many more individuals do not get full protection as a consequence of how they are labelled”.

A second element that has an important influence on media representation of migration and refuge is the main topic of the news. A careful analysis of the selected news items helped to identify four main themes in media coverage: 1) border control and security (37%); 2) conditions and management of refugee camps in different countries (30%); 3) the experience of migrants and refugees during the pandemic (20%); and 4) the need for migrant labour in Europe and Spain (6%). Of course, these are big comprehensive themes, that in-

⁸ All emphasised words in this article are the author’s work. These words have been italicised to highlight their positive or negative connotations.

clude many other related topics, and that can appear together in the news articles.

The third element that strongly influences the representation of migrants and refugees is sourcing routine, as depending on the sources' interests and social position they offer different perspectives of social reality. News analysed used NGOs (cited in 40% of news items), refugees (30%) and politicians (13%), as their main sources.

From the interrelation between the main theme addressed and the sources used, different perspectives emerged. News using political sources addressed three main topics: border control and security, the need of migrant workforce, and the management of the refugee camps in Greece. From different perspectives, the three topics coincide in interpreting migration (whether forced or voluntary) as a problem to be solved. Regarding border control and security, Valero (2020) reports that the leaders of Poland, Hungary, Czech Republic and Slovakia met to address the migration crisis on the Greek frontier. For these political leaders, the solution was "to *strengthen* the EU's external borders and to *fight* against *human traffickers* who will take advantage of the current situation to *flood* Europe" (Valero, 2020). The reference to traffickers, flooding water, and the use of the verb *to fight*, contribute to transmit the idea of a highly dangerous and uncontrollable situation at the European borders, which requires decisive action to repel offenders. Politicians point at human trafficking as a problem to be urgently addressed (Espinosa, 2020; Moltó, 2020; Ponce, 2020; Valero, 2020). At no time is human trafficking attributed to the growing obstacles that Europe is putting to the legal arrival of immigrants and asylum seekers, the main reason why they resort to traffickers.

A second topic addressed by political sources is related to migrant workforce supply. In a context of border closures due to the pandemic, seasonal workers cannot reach the European countries where they are needed. Faced with the urgent need for agricultural labourers, even the German far-right party calls for these workers to

be admitted, although they must be "*European workers*" and "migrants, not asylum seekers" (Carbajosa, 2020). This news article also cited the President of the European Commission, Ursula von der Leyen: "We need the people who plant and harvest our crops. We have to make sure we have enough *temporary workers* in agriculture". Although this news seems to transmit something positive (immigrants are necessary and wanted), the words used point to the other direction: entry must be "controlled", "temporary", and only for "non asylum-seekers".

A third theme has to do with refugee camps management. In a news item the Greek government spokesman affirms that the refugee camps in Greece are "*anarchic*" and a "*bomb* for public health", and that is why they want to build "*closed controlled centres*", with capacity for 20 000 people (*El País*, 2020). He states that "closed premises are *safer* and *limit health risks*", "problems [related to coronavirus] can be *effectively treated*", and this plan "*benefits* local communities", since these facilities would be "away from the urban centre, so that economic and social activity can regain *normality*". Despite the positive connotations of the words chosen for his statements, some conclusions can be drawn from this plan: a desire to strengthen control over the refugee camps by using closed buildings, where access can be monitored; and a desire to hide refugees and keep them out of sight and daily interaction with the inhabitants of the islands (needless to say how this looks like a prison).

News in which political representatives are the main source of information, clearly contrast with those which cover the topic from the NGOs' and refugees' perspective. These news articles present humanitarian themes and report on refugee as a human drama, an experience that increases the vulnerability of those who have been forced to leave their homes to save their lives.

Regarding the sources coming from NGOs and civil society, international organisations such as Doctors Without Borders, Save the Children or the United Nations Refugee Agency (UNHCR), are

mostly cited in the news referring to the refugee camps in Greece, whilst national NGOs prevail when dealing with the Spanish context. Their discourses focus on two main topics. Firstly, the programmes and activities they develop – now interrupted by the pandemic –, related to the bad condition of the refugee camps. In this regard, sources highlight the dramatic situation in the overcrowded refugee camps, with few cleaning and hygiene measures, and lack of healthcare. Under these circumstances, the arrival of the coronavirus can be a disaster (de la Cal, 2020).

The second main theme addressed by sources from NGOs focuses on border control, but from a different perspective than that of political sources: European migration and asylum policies are strongly disapproved. National and international NGOs claim their work is more necessary than ever, and criticise the criminalisation of solidarity, that is, accusing those organisations which rescue people in the Mediterranean of human trafficking, one more EU strategy to make it difficult for people to reach European territory (Moltó, 2020). NGOs also report that different countries are not complying with the 1951 Geneva Convention, by not allowing asylum seekers to enter their territory (Bonet, 2020; Ponce, 2020). And of course, confinement in camps is criticised:

NGOs have long been *warning* of the *impossibility* of reproducing in Moria the recommendations that are given to the general population. Doctors Without Borders, among others, has called for asylum seekers to be *evacuated* to places where they can *protect* themselves. “Forcing people to live in *overcrowded* and *unsanitary* camps as part of European containment policies was always *irresponsible*, but now, due to Covid-19, it is more so than ever,” says Apostolos Veizis, chief of the NGO medical service in Greece. (Otero, 2020)

Finally, refugee sources explain first-hand their experience during the pandemic, in relation to three main themes: life in the refugee camps, their work in essential sectors in Spain, and the need for social and legal recognition. Regarding the refugee

camps, these sources provide a perspective from within. They witnessed how they were completely fenced by police, and how volunteers were forced to leave due to an alleged fear of the spread of coronavirus. Refugees were also prohibited from approaching the neighbouring towns, where they often went to top up their mobile phones and to buy food (Mourenza, 2020).

Confined and without the NGOs’ help, refugees started developing their own initiatives: clothes and mask manufacturing workshops, cleaning, and awareness tasks to inform about the measures imposed on public spaces. In Moria, the lack of a good communication infrastructure motivated the creation of volunteer refugee groups to inform about the pandemic, the Moria Coronavirus Awareness Team (MCAT).

For more than two weeks, volunteers have been creating social media content and posters in multiple languages and announcing recommendations with megaphones. “Many are not aware of the reality of the virus, so we explain what it is, tell them they shouldn’t shake hands, that they should avoid crowded places and try to stay inside the tents”, Mohammad explains. (Otero, 2020)

Different news articles reflect this active engagement of refugees. This type of news content is summarised in the words of one of the refugees who is part of the MCAT: “Refugees are *capable* of doing things for *themselves*” (Otero, 2020).

Also in Spain, migrant and refugee voices explain their experience during the pandemic, highlighting their actions to collaborate with the manufacturing of masks and protective suits, helping with the food bank and supporting regularisation advocacy activities through the *#RegularizaciónYa* campaign (*#Regularisation Now*) (Jáuregui, 2020). This campaign asks for the regularisation of all irregular immigrants, to promote their social and health protection during the pandemic. The actions carried out demonstrate a firm commitment to the host country, regardless of migrants’ legal situation. They want to be full citizens, with rights and duties. Their actions and discourses combine the pride

and satisfaction of contributing to fight against the global pandemic, with the fear and helplessness generated by their irregular situation. Campaign spokespeople remind that they are essential workers, in the agricultural sector but also in other services such as cleaning, transport, or the care sector, yet they remain totally unprotected while the virus has increased their vulnerability.

We have been *left behind* despite being in the *front line*, we are the *essential* ones, caregivers, some were *fired* and others went this monday to clean up without any *prevention* protocol for them” says Edith Espinola, spokesperson of the #RegularizaciónYa campaign. (Jáuregui, 2020)

6 The politics of representation in times of a pandemic

The qualitative content analysis reveals four types of media representations of migration and refuge. Two of them are reasonably usual: the immigrant as a threat or as a victim (Martínez Lirola, 2013; Retis, 2006; Rodrigo-Alsina et al., 2019), although COVID-19 introduced nuances to these types of representations. The other two are quite new: the immigrant as necessary and the immigrant as an active agent. The predominant representation depends on the newspaper analysed, as their ideological stance may influence their discourses and main themes addressed.

6.1 Migrants as victims

The portrayal of migrants and refugees as victims and vulnerable people is the most common in the media analysed. This representation derives from their experience with dictatorships, armed conflicts,

natural disasters, human traffickers and discrimination. Now, new causes for victimisation arise: mobility restrictions and racism derived from the COVID-19 pandemic. News highlighted that border closures increased their vulnerability, whether they are living in very poor conditions in refugee camps or are stranded in transit or destination countries without an income, social protection or health assistance (Ponce, 2020).

Health emergency has also given wings to racism and xenophobia, as reported by news referred both to refugees in Greece, Malaysia, Kenya or South Africa, and the Spanish context. The fact that the virus was discovered in China made Chinese migrants in Spain experience verbal aggression and rejection, but they have not been the only ones. The economic crisis that has accompanied “the new normal” led to the rejection of immigrants and refugees, perceived not only as competitors in an already damaged labour market but also consumers of an increasingly decimated welfare state (Martínez Lirola, 2013).

This economic and sanitary situation encouraged xenophobic discourses articulated by the right and far-right political leaders. To give an example, Almoguera (2020) reports the refusal of a mayor from the People’s Party to admit refugees in a hotel in his local area, whilst the far-right party VOX did not miss this occasion to criticise the leftist Spanish government affirming it “accommodates *irregular* immigrants in *luxury* hotels” and “provides masks, hand sanitiser gel and other protective material to immigrants”. This statement is an example of the “Spanish First” ideology, which contributes to an anti-immigration stance and reinforces discrimination.

Table 1: Predominant types of media representation (N = 30)

Newspaper	As victims and vulnerable people	As a threat or a problem to be solved	As necessary	As active people
<i>El Mundo</i>	7	1	0	0
<i>El País</i>	8	5	6	3
in %	50	20	20	10

6.2 Migrants as a threat

The representation of migrants as a threat is common worldwide (Esses, Medianu, & Lawson, 2013; Parker, 2015; van Gorp, 2005). They can be presented as a threat to national security, a cultural threat or a threat to community cohesion, a threat to welfare and health systems, and even as a public threat by linking refugees and migrants to crime (Berry et al., 2015).

It is remarkable that during the pandemic migrants and refugees have not been portrayed mainly as sick people affected by a life-threatening virus, but as potential coronavirus transmitters, that is, as a threat to public health. For example, on the US-Mexican border, the fear of deportees spreads:

Deportees from the United States also include hundreds of Central Americans who have to cross all of Mexico to reach their home countries. These days they are not only migrants, but they are also “potential viruses” in transit. (Morán, 2020)

In Asia, Ponce (2020) reports about the drama of the Rohingya, fleeing their country (Myanmar) to find only closed borders in the countries around the area, as the coronavirus crisis offers an excuse to do so:

The [Malaysian] government justifies it as an anti-coronavirus measure by suggesting that refugees could be *carriers*. This response has only served to further *stigmatise* refugees by drawing them as a *threat* to the country. (Ponce, 2020)

The closure of refugee camps is also related to this idea of seeing refugees as the transmitters of the virus, despite being the volunteers and external staff who usually brought the virus into the camp. In Spain, the coordinator of a Red Cross refugee centre where seven cases of COVID-19 had appeared, clarified that, “against those who spread ‘the idea of the *black* coming to *infect* us’, it was external staff who transmitted the virus to internees” (Almoguera, 2020).

Fear of contagion has been used to further securitise migration, even if measures adopted are not internationally approved.

For example, Mourenza (2020) reports that Greece stopped applying the 1951 Geneva Convention, using tear gas and firearms to deter asylum seekers in the frontier, and causing the death of two asylum seekers.

6.3 Migrants as necessary: The essential workers

The coronavirus pandemic has brought with it a new representation: the migrant as an essential worker. It does not mean they have not been necessary all the time, but the closure of frontiers and the forced confinement brought the issue to the front page and stated it plainly: Our economies depend directly on the immigrant workforce, so the frontiers should be open for those who have to work in agricultural, care and other essential sectors. Of course, this utilitarian discourse has nuances, and some migrants are preferred to others: “temporary workers”, “EU migrants”, but “not asylum seekers” (Carbajosa, 2020).

Six news articles, all of them published by the left-wing newspaper *El País*, represented migrants as necessary for the Spanish economy. Their work in essential sectors kept them exposed to make everything work, while others stayed at home. Sadly, these essential workers are the most precarious and vulnerable. In this context, *El País* is open to recognising the contributions of migrants to the Spanish society and economy:

These people support our pension system and our labour market, in *essential* sectors such as care or distribution and supermarkets, so *important* in this time of health emergency. [...] sectors that experience great job *insecurity* and less *social protection*. (Ares, 2020)

By recognising this fundamental contribution, the newspaper is pressing for a change in the migration model. The pandemic, as a crisis, is also “an *opportunity* for a radical change of model to achieve a *regular* and *orderly* migration system in which contribution of migrants to essential sectors is *recognised*” (Fanjul, 2020). The change must include the regularisation of irregular migrants, who are in this situation because of the obstacles to legal

entry and residence imposed by Europe, which far from dissuading potential migrants generates dramatic situations in the frontier and feeds human smuggling.

The representation of migrants as essential workers has different nuances depending on the sources used by the media. Political sources maintain a utilitarian and self-interested stance on immigration, as something we can temporarily benefit from, whenever we want, without offering anything in return (Carbajosa, 2020). The rejection of the arrival of people who stay, who have rights as well as duties, is clearly observed, and instead, the use of temporary workers who leave when no longer needed – with nothing to claim, no rights to demand – is advocated. Despite needing them, the border still stands.

To the contrary, civil society, NGOs and migrant and refugee sources demand recognition of the cultural and economic contributions of migrants to society, and the necessity to make changes in the European and Spanish migration policy to ensure social protection and health care provision for all (Fanjul, 2020; Jáuregui, 2020).

6.4 Migrants as active agents

The sample of news examined shows a fourth type of representation of migrants and refugees: as active agents both in the prevention of COVID-19 and claiming citizenship rights. This type of representation is not common in the mainstream media – which tends to represent them as passive, vulnerable, needy victims –, although it is the dominant pattern in the ethnic minority media developed in Spain (Echevarría, Ferrández-Ferrer, & Dallemagne, 2015; Ferrández-Ferrer, 2019).

With the closure of the refugee camps, asylum application procedures being interrupted and the departure of NGO workers, it seems that life has stopped for the refugees. Social interaction is paralysed, with thousands of people crammed into tents or small shacks built by them. Moreover, all educational programmes, health related workshops and labour activities developed by the NGOs have been interrupted until further notice. In this dramatic scenario, the media begin to portray a

new type of refugee: the active, motivated, decisive, organised refugee, who collaborates to protect the entire camp from the threat of the virus. They do not present themselves as passive victims, or recipients of NGO support, but as active and motivated agents involved in a common task (Alhejazi, 2020; Otero, 2020).

Also in the Spanish context, migrants and refugees appear as active agents against the coronavirus, motivated people working together to improve their lives and the rest of society, becoming essential during this time of confinement, and deserving social and legal recognition (Esbert-Pérez, 2020; Jáuregui, 2020). Reporting on the *#RegularizaciónYa* campaign and the rest of initiatives developed by them in Spain and in the refugee camps, migrants are portrayed in a positive way: they take initiative, they can do things by themselves, they are intelligent. They are like *us*.

Also by giving them the opportunity to speak by themselves – to be subjects and not mere objects of mediated discourses –, the media analysed are recognising them as legitimate interlocutors. This representation of refugees as active agents in mainstream media could be a step towards more favourable representations, more accessible to the wider audience than those present in the ethnic media.

7 Conclusion

At the beginning of this article, two important questions were introduced: Have the politics of representation of migration and asylum changed during the pandemic? What new imaginaries are built around migrants and refugees in the media? A qualitative content analysis of news published by *El País* and *El Mundo* during a period of one hundred days shows continuities and also changes. The representation of migrants and refugees as victims or as a threat continues till today but takes on new forms due to the coronavirus. The pandemic has served as an argument against immigrants, accusing them of its spread, although migratory movements

worldwide are reduced if compared to international mobility due to tourism, leisure and business (Lacomba, 2020).⁹ But whilst many efforts have been done to reactivate international tourism and business, migration is still labelled as a threat.

However, COVID-19 also brought changes. The representation of migrants as essential for European economies is one of them. During the period analysed, the right-wing newspaper *El Mundo* did not publish news items offering this type of representation although, after many months of pandemic, this imaginary is nowadays present in all media outlets (Matarín, 2020). Clearly, recognising the contribution of migrants to society is positive, but this discourse seems to be too focused on the economy, forgetting social and cultural contributions, and resulting too utilitarian (Kancs & Lecca, 2018). Moreover, political discourse on this issue seems to remain firm in its position of making Europe a fortress. Borders have been reinforced, and for those already in European territory no long-term integration is offered, no regularisation programmes are debated, no citizen rights are guaranteed after the pandemic.

Refugee and migrant sources offered a different perspective of reality. A recent study showed how media voicing strategies can produce silencing and “misrecognition of refugees as political, social and historical actors, thereby keeping them firmly outside the remit of ‘our’ communities of belonging” (Chouliaraki & Zaborowski, 2017, p. 629). However, these sources have been necessary to introduce changes in the media dominant representations. Thousands of kilometres away, in the refugee camps in Greece or Jordan, migrants and refugees acquire a new consideration: They are portrayed as active, motivated, organised people, who have a voice, and who can do things for themselves. Accustomed to seeing the refugees through the eyes of others (Smets & Bozdağ, 2018), this type of representation is a novelty. Refugees have agen-

cy. Although the limitations imposed by the coronavirus affect them severely in the refugee camps, these initiatives empower them against the disease and also against those who only see them as passive and needy victims, recipients of international aid.

In Spain, the awareness of being necessary encouraged migrants to start a campaign to ask for their regularisation, and thus achieve the social and legal protection they need. This is not the first time that they ask for the extension of citizen rights (Suárez, Macià, & Moreno, 2007). But perhaps this time their demand will be heard, considering the important role they are playing during the pandemic. The newspaper *El País* seems to support a change in the immigration policy of the Spanish government. Maybe Spanish society will support it as well in the short term, given the media potential to influence public opinion and policy.

Time has passed since the first news article which included the words *refugee* and *coronavirus* was published in Spain. Although it is too early to draw conclusions, the pandemic may produce changes in our understanding of migration processes. The new politics of representation of migrants and refugees seem to point in that direction. But an important question remains: To what extent can such representations oppose or challenge the dominant politics of representation of refugees and migrants as victims or as a threat? Positive and negative representations will probably coexist in the media for a long time – or at least for the duration of the pandemic. The outcome of the health and economic crisis could tip the balance one way or the other, influencing public opinion accordingly. Future research, including a larger number of newspapers and a longitudinal perspective, could contribute to clarify in which direction the changes are pointing.

9 In 2019, the number of international migrants was 272 million (IOM, 2019), while 1.5 billion international tourist arrivals were recorded globally (UNWTO, 2020b).

Conflict of interests

The author declares no conflict of interests.

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La comunicazione di Matteo Salvini durante la pandemia: l'immigrazione e la delegittimazione dell'avversario politico

Matteo Salvini's communication during the pandemic: The immigration issue and the de-legitimation of political opponents

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Abstract

Following the critical discourse analysis approach, this article intends to highlight how the anti-immigration perspective is (re)produced within the Facebook page of the Italian political leader Matteo Salvini during the pandemic scenario between March 2020–March 2021. Quantitative and qualitative analysis have been applied to Salvini's posts and users' comments aiming at identifying the linguistic strategies that contribute to instrumentalizing the emergency and aim to reinforce the process of "securitization" of national borders as well as the re-legitimation of national identities. Findings suggest that the main discursive strategies used by the political leader do not include migrants as a danger for the spread of the virus. Rather, Salvini systematically organized the migratory narration on negative campaigning blaming political opponents and recontextualized the moralization of borders. The contribution helps to reveal how the anti-migration discourse is reproduced during the COVID-19 outbreak and how the politicization of the migration serves as a context for the normalization of migrant's exclusion.

Keywords

anti-immigration; COVID-19; critical discourse analysis; political communication; social media communication; populism; critical discourse studies

1 Introduzione

Se negli ultimi anni l'interesse per la rappresentazione dei media verso i fenomeni migratori ha riscontrato un forte incremento nella ricerca accademica internazionale, l'approccio critico-discorsivo applicato ai testi online rimane poco esplorato nell'attuale cornice mediale e politica italiana. In tale cornice, la mediatizzazione sta portando la politica ad alterare le sue modalità di funzionamento in un processo di ricerca di attenzione mediatica piuttosto che di rappresentazione politica (Krzyżanowski, Triandafyllidou, & Wodak, 2018), rendendo i confini tra politico e cultura pop sempre più sfumati (Mazzoleni & Bracciale, 2019). Questo processo viene agevolato da una serie di caratteristiche della comunicazione politica nei social media in grado di disintermediare e semplificare la relazione tra leader e cittadini rendendo l'azione performativa

dei politici sempre più determinante nel plasmare le narrazioni nelle agende dei media.

Tali dinamiche della mediatizzazione agevolano una diffusione trasversale del discorso sulle migrazioni rendendolo ideologicamente orientato soprattutto se messo in relazione con l'emergenza sanitaria globale, la quale ha ampliato il rischio di una normalizzazione di disuguaglianze formali e sostanziali verso le figure di rifugiati e richiedenti asilo. Se le migrazioni rappresentano dagli anni Novanta l'oggetto privilegiato del «panico morale»¹ in Italia (Dal Lago, 2012; Maneri, 2001), la

1 Il termine fa riferimento alla nota opera di Stanley Cohen "Folk devils and moral panics: The creation of the mods and rockers" (1972) nella quale per panico morale si intendono ondate emotive per le quali un gruppo di persone viene definito dai mass media, politici e commentatori come minaccia per i valori di una società erigendo barricate morali.



recente emergenza sanitaria dovuta alla pandemia COVID-19 ha contribuito al rafforzamento delle «politiche della paura» (Wodak, 2015) portando ad un'ulteriore chiusura dei porti italiani dichiarati «non sicuri» e a una continua sospensione del diritto che assicura il soccorso in mare, nonché rafforzando la criminalizzazione delle operazioni di salvataggio. Nonostante l'OMS abbia dichiarato che la salute di migranti non può essere separata dalla salute della popolazione generale, le persone in fuga da guerre e persecuzioni sono state escluse dai percorsi di protezione sanitaria² (Carlotti, 2020) consolidando il processo che li definisce 'Altro' e ampliando la percezione del panico morale soprattutto attraverso il potere discorsivo dei media e il loro ruolo di «macchina della paura» (Dal Lago, 2012).

L'emergenza sanitaria provocata dal virus COVID-19 va letta, dunque, come crisi globale in cui coloro che appartengono all'*in-group* definiscono con maggior facilità i gruppi «esterni» percepiti come «Altri significativi» (Triandafyllidou, 1998). Più generalmente l'emergenza sanitaria sta rappresentando un contesto storico inedito, che non solo mette in discussione il modello di mobilità transnazionale, ma si configura come momento rivelatore per comprendere i meccanismi di *framing* e le strategie di legittimazione in grado di plasmare la rappresentazione delle migrazioni e le modalità con cui i leader politici ne strumentalizzano il racconto. In questa direzione, durante i primi mesi della diffusione del virus, la metafora della guerra è stata quella maggiormente utilizzata dai politici e dai media nella narrazione della pandemia nella quale il coronavirus incarna il ruolo del nemico (Battistelli & Galantino, 2020; Boni, 2020). In tali condizioni di eccezionalità, i politici possono contare su un uditorio che diventa insolitamente

attento in quanto motivato a ottenere soluzioni urgenti e in grado di inquadrare gli eventi e di ordinarli in una narrazione coerente (Battistelli & Galantino, 2020).

L'analisi di un fenomeno considerato strutturalmente emergenziale, come le migrazioni, acquista dunque rilevanza nel contesto dell'attuale crisi sanitaria in quanto permette di comprendere le ricontestualizzazioni degli scenari tradizionali di emergenza che legittimano discorsi e politiche di esclusione e definiscono immaginari presenti e futuri sul piano ideologico (Krzyżanowski et al., 2018). Quest'ultimi vengono normalizzati attraverso la riproduzione di un discorso che, con l'intento di descrivere la realtà, cessa di raccontarla, legittimando tuttavia proposte politiche da adottare nel presente (Krzyżanowski, 2020). In questa direzione, dal punto di vista discorsivo, la letteratura ha ampiamente discusso di «discorso borderline» che, in un contesto di società incivile è gradualmente migrato dagli spazi online più marginali rispetto alla politica e ai media tradizionali, agevolando così il processo di normalizzazione della retorica anti-immigrazione (Krzyżanowski, Ekman, Nilsson, Gardell, & Christensen, 2021; Krzyżanowski & Ledin, 2017; Krzyżanowski et al., 2018). Tale processo si basa sulla costruzione di un discorso in cui affermazioni e messaggi estremi sono spesso sposati con un linguaggio apparentemente civile fungendo da legittimazione di posizioni e ideologie estreme, razionalizzate e trasformate in elementi accettabili del discorso pubblico (Krzyżanowski, 2020).

Partendo da questo contesto storico inedito, e alla luce del quadro teorico introdotto, l'obiettivo del presente lavoro è approfondire le possibili nuove articolazioni del discorso anti-immigrazione (ri) prodotto sui social media e, in particolare, verificare le ricontestualizzazioni di tale discorso di fronte alle sfide poste dall'emergenza sanitaria, approfondendo le strategie argomentative che legittimano discriminazioni verso i migranti giocando sul piano della razionalità. Fine specifico è dunque comprendere se e in che modo l'emergenza sanitaria sta rappresentando un contesto in grado di agevolare un proces-

2 Nello specifico si riconosce che il «decreto sicurezza» del 2018 ha impattato sul diritto alla salute dei migranti i quali, se privi di documenti, vengono esclusi dal Servizio Sanitario Nazionale avendo un limitato accesso ai servizi sanitari di base divenendo, di fatto, trascurati dalla autorità italiane (Carlotti, 2020).

so di pre-legittimazione (re)introducendo elementi (inediti) sul piano discorsivo in grado di rafforzare e normalizzare il discorso populista anti-immigrazione.

Tale obiettivo è perseguito attraverso l'analisi della comunicazione del leader politico italiano che con maggiore efficacia costruisce il discorso anti-immigrazione sfruttando il potenziale comunicativo dei social media (Bracciale, Andretta, & Martella, 2021; Milazzo, 2020; Ziccardi, 2016). L'analisi è sviluppata all'interno della pagina Facebook del leader della Lega Matteo Salvini e si concentra sulla relazione tra pandemia globale e la migrazione di migranti verso le coste italiane durante il primo anno di emergenza sanitaria (marzo 2020–marzo 2021). Nello specifico, il lavoro di analisi si articola partendo dalle seguenti domande di ricerca:

- › R1: Quale rapporto lega il tema delle migrazioni a quello dell'emergenza sanitaria?
- › R2: Quali sotto-temi prevalgono creando il maggior volume di interazioni?
- › R3: Attraverso quali strategie il discorso anti-immigrazione viene legittimato e normalizzato durante l'emergenza sanitaria?³

A partire da queste domande di ricerca, il contributo intende, inoltre, verificare l'ipotesi secondo la quale la narrazione di Salvini durante la pandemia è caratterizzata dalla connessione tra la migrazione e il pericolo della diffusione del virus, sfruttando tradizionali retoriche de-umanizzanti che assegnano alle figure di rifugiati e richiedenti asilo un ruolo di minaccia per la salute della popolazione (Musolff, 2012).

Per rispondere a tali domande, la ricerca empirica presenta una prima fase di analisi quantitativa, per poi soffermarsi sulla dimensione discorsiva analizzandone i pattern prodotti dal leader. Le analisi vengono collocate all'interno della cornice

di emergenzialità che contraddistingue la narrazione dell'immigrazione in Italia (Binotto, Bruno, & Lai, 2016) e intendono individuare, inoltre, convergenze e differenze tra la dimensione discorsiva *top-down* e quella *bottom-up* al fine di decostruire la coerenza e la coesione dei testi e riflettere sul potere discorsivo e sul circuito con cui questo diffonde la sua legittimazione. Alla luce di questi obiettivi, il contributo intende inserirsi nel campo di studio delle rappresentazioni mediatiche dei fenomeni migratori e a quello interessato alla dimensione discorsiva del populismo e della sua normalizzazione (Krzyżanowski & Ledin, 2017; Krzyżanowski et al., 2018) alla luce delle sfide poste dall'emergenza sanitaria.

2 Il nuovo paradigma comunicativo e le implicazioni per il discorso

Il campo dei *critical discourse studies* (CDS) mira a decostruire le prospettive ideologiche che permeano i testi al fine di vedere come queste prospettive possano riprodurre relazioni di potere ineguali soprattutto in relazione al discorso politico e dell'informazione (ri)prodotto nei e dai media (Wodak & Mayer, 2015). Negli ultimi anni la dimensione discorsiva ha acquisito un piano d'analisi imprescindibile nel contemporaneo sistema mediale ibrido (Chadwick, 2013), in cui la forza destabilizzante dei media digitali ha modificato profondamente le regole e la stessa natura del dibattito politico introducendo mutamenti nella diffusione dell'informazione, nelle forme della comunicazione e nella configurazione della sfera pubblica (Mosca & Vaccari, 2011). Alla luce di tali riconfigurazioni, il campo CDS è stato ridefinito *social media critical discourse studies* (SM-CDS) (KhosraviNik, 2017): i temi più popolari della *critical discourse analysis* (CDA) come identità, discriminazione razziale, riproduzione dell'ideologia e persuasione hanno trovato nuovi sviluppi di analisi nelle piattaforme digitali in quanto spazi interattivi, multimodali e *circularly networked* (KhosraviNik, 2014). I social si sono configurati come «architettura sociale» con cui i pubblici si con-

3 Nello specifico si intende approfondire le caratteristiche linguistiche adottate da Salvini nella realizzazione di schemi argomentativi che compongono il discorso esclusionario verso i migranti nel contesto della crisi sanitaria.

frontano quotidianamente (Bentivegna & Boccia Artieri, 2019) non solo attraverso *reactions* per esprimere il proprio stato affettivo, ma ponendo al centro la dimensione discorsiva e la sua intertestualità che interessa diverse pratiche, piattaforme e attori. Queste caratteristiche sembrano garantire ai politici reazioni più immediate da parte del pubblico attraverso strumenti comunicativi che aumentano il potenziale coinvolgimento politico (Kruikemeier, van Noort, Vliegthart, & de Vreese, 2013; Mosca & Vaccari, 2011). Più in generale, con il processo di quotidianizzazione degli spazi pubblici digitali, stiamo assistendo a una riconfigurazione della relazione tra discorso e potere dei media che sta affermando nuove sfide nella comprensione della relazione tra produttori e fruitori di testi, combinando spazi e contenuti tradizionali con quelli creati dal basso (Khosravini & Unger, 2015; Lucchesi, 2020). Se i media tradizionali erano contraddistinti da un flusso comunicativo unilaterale, definito *one-to-many*, i media digitali focalizzano l'attenzione a un modello inteso *many-to-many* analizzando il flusso di contenuti interattivo, orizzontale e partecipativo segnando una de-monopolizzazione dei social media rispetto a quelli tradizionali (Khosravini & Esposito, 2018). Si è parlato, infatti, di nuova audience (Boccia Artieri, 2012) come soggetto pubblico in grado di negoziare in tempo reale i frame proposti dai media tradizionali, riarticolarne la relazione tra democrazia, sfera pubblica e flussi di comunicazione (Grossi, 2011).

3 La comunicazione politica nei social media: tra popolarizzazione e populismo

All'interno di queste riconfigurazioni, i linguaggi e le forme della comunicazione politica sono state interessate da un processo di rinnovamento apportato dalla diffusione dei social media che ha permesso ai leader politici nuove possibilità di personalizzazione della loro comunicazione (Mazzoleni & Bracciale, 2019). I media tradizionali avevano già sviluppato un adattamento della comunicazione dei soggetti

politici a logiche commerciali, portando a campagne elettorali sempre più «ibride» servendosi dell'interazione di logiche mediali tradizionali e quelle digitali (Bracciale & Cepernich, 2018).

Gli studi interessati alla popolarizzazione della politica nei media digitali offrono un contributo centrale al fine di comprendere come i leader politici producono senso nella sfera pubblica *networked* (Benkler, 2006) mostrando il ruolo dei processi di personalizzazione, disintermediazione, semplificazione e velocizzazione della comunicazione politica (Bentivegna, 2006, 2015) sempre maggiormente inserita nelle logiche mediali di spettacolarizzazione e vetrinizzazione scandite dai media (Mazzoleni & Schulz, 1999, p. 251). Tali dinamiche sono state interpretate come gli sviluppi della *politica pop* basata sull'adozione di forme comunicative che rivelano la volontà dei leader di avvicinarsi al popolo attraverso strategie e strumenti in grado di funzionare da collante tra il ceto politico e la cittadinanza (Mazzoleni & Bracciale, 2019, p. 32). Nello specifico, la politica pop costituisce uno degli effetti della mediatizzazione della politica per la quale la comunicazione dei leader si adatta a logiche commerciali e dell'industria culturale attraverso ritmi narrativi tipici della cultura pop digitale che obbliga a porre l'attenzione sulla natura linguistica ed estetica delle culture della rete che permeano nella politica e che legittimano, ad esempio, una predisposizione all'irriverenza e alla presenza di comportamenti denigratori, opinioni sessiste, omofobe e razziste (Boccia Artieri, 2019). In questa direzione la letteratura scientifica più recente definisce il selfie e il meme le espressioni più significative della politica pop online e individua nei leader populistici gli attori politici maggiormente abili a sfruttare strumenti comunicativi solitamente prodotti dai pubblici dal basso e viceversa (Mazzoleni & Bracciale, 2019) dando vita a un circuito che fa persistere l'ideologia populista grazie a pratiche egemoniche riprodotte dal basso attraverso i social media (Fuchs, 2016).

Sebbene il populismo⁴ venga tradizionalmente definito e analizzato nei termini di ideologia (Mudde, 2004; Mudde & Kaltwasser, 2013), recentemente ci si è approcciati al fenomeno come stile comunicativo analizzandone la componente discorsiva (KhosraviNik, 2018; Moffitt, 2016) attraverso lo studio del linguaggio emotivo basato su slogan ed esagerazioni (Mudde, 2004) con cui si ridefiniscono i confini di ciò che viene considerato lecito esprimere agevolando una sua normalizzazione. Tale discorso viene enfatizzato dalla ricettività dei media e dal legame tra l'espansione del populismo e l'ecosistema della comunicazione digitale (Mazzoleni & Bracciale, 2019). Va sottolineato, inoltre, che i processi di mediatizzazione e popolarizzazione della politica sembrano aver amplificato una delle caratteristiche centrali della retorica populista ovvero la polarizzazione delle posizioni politiche che contrappone il popolo alle élite (Mazzoleni, 2014) attraverso una prospettiva manichea che combina la valorizzazione positiva del «noi» con la denigrazione dei «loro» supportata dal *negative campaigning* e dall'attribuzione della colpa verso le élite (Hameleers, Bos, & de Vreese, 2017; Plasser & Ulram, 2003).

Nella cornice di mediatizzazione e popolarizzazione, la *produzione memetica* si basa su un senso di coinvolgimento di tipo emozionale ed umoristica ed è contraddistinta da due funzioni principali: da una parte il sostegno del portato ideologico della propria fazione politica, dall'altra la critica e la delegittimazione degli avversari costruite entrambe sull'ibridazione di lin-

guaggi tra leader politici e cittadini-utenti (Mazzoleni & Bracciale, 2019, p. 99). Tali strumenti retorici massimizzano il loro portato ideologico attraverso gli aspetti visuali della politica pop modificandone i vocabolari visivi e le modalità di diffusione (Johansson & Holtz-Bacha, 2019). La dimensione visuale ha sviluppato infatti un proprio «linguaggio» in relazione alla delegittimazione dell'avversario politico sfruttando paura, umorismo e satira che trovano nelle piattaforme digitali maggiori probabilità di condivisione e convincimento di potenziali elettori (Johansson & Holtz-Bacha, 2019).

4 Le migrazioni in Italia, la crisi dei rifugiati e l'emergenza sanitaria

Un ultimo quadro teorico di riferimento riguarda gli studi interessati alla rappresentazione mediale dei fenomeni migratoria in Italia. Dopo oltre 35 anni di indagini, è possibile individuare alcuni elementi essenziali che ricostruiscono il ritratto delle migrazioni il quale è stato definito immobile e congelato (Binotto et al., 2016, p. 33). Le immagini negative e de-umanizzate dei migranti, la retorica dell'invasione e dell'emergenza sicurezza si sono consolidate come aspetti strutturali dei media e dell'informazione nazionale dall'inizio degli anni Novanta raggiungendo un particolare livello di efficacia quando il sistema mediatico si attiva su eventi che posseggono un carattere di eccezionalità (Maneri, 2001). Tali dinamiche sono state rafforzate dal fenomeno migratorio che dal 2015 è stato riconosciuto come 'crisi migratoria' riguardando una questione umanitaria, politica e sociale interessata ai processi di politicizzazione e mediatizzazione (Krzyzanowski et al., 2018; van der Brug, D'Amato, Ruedin, & Berkhout, 2015). La «crisi migratoria» ha amplificato visioni politiche contrapposte intensificando un dibattito pubblico fortemente polarizzato che oscilla tra sentimenti nazionalisti che enfatizzano una re-legittimazione delle identità nazionali, e una posizione transazionale basata sull'unità, la diversità e un progetto di solidarietà e giustizia socia-

4 Una definizione ampiamente condivisa di populismo lo descrive come una sottile ideologia che considera la società separata in due gruppi omogenei-antagonisti: «il popolo puro» e «l'élite corrotta», sostenendo che la politica dovrebbe essere un'espressione della volontà generale del popolo (Mudde, 2004; Mudde & Kaltwasser, 2017). Adottando un approccio comunicativo e discorsivo, il presente lavoro considera il populismo come una variabile per la quale ogni attore politico può essere più o meno populista piuttosto che limitarsi a un'opposizione binaria tra ideologie populiste e non-populiste (Moffitt, 2016).

le (Zappettini, 2019). I risultati di recenti studi europei suggeriscono che in relazione alla «crisi migratoria» siamo di fronte a una ricontestualizzazione nazionale e transnazionale dei modelli storici con cui si percepiscono i fenomeni migratori e le persone che migrano attraverso la modificazione di argomenti e temi da un genere all'altro, da un piano pubblico ad un altro (Krzyzanowski et al., 2018). Nello specifico, il processo definito di moralizzazione dei confini (Vollmer, 2017) evidenzia come le misure di securizzazione e militarizzazione sono attuate non solo a livello politico, ma anche a livello morale implicando una serie di strategie discorsive che legittimano l'esclusione delle persone che migrano mentre viene giustificato il fondamento morale dell'UE e degli Stati membri (Wodak, 2017).

Come la «crisi migratoria» anche l'emergenza sanitaria provocata dal COVID-19 rappresenta a pieno quel distacco dalla «normalità informativa» (Binotto et al., 2016, p. 47) che produce una rappresentazione mediale delle migrazioni satura di elementi di notiziabilità e spettacolarizzazione in grado di accentuare narrazioni deformate che legittimano la negazione di rifugiati e richiedenti asilo. Recentemente è stato osservato il ruolo della pandemia come terreno simbolico su cui costruire un campo discorsivo per la politica e per l'informazione (Boccia Artieri, 2020) nel quale la metafora della guerra sta offrendo un repertorio di analogie e di associazioni nella definizione dello stato di crisi, permettendo di «pre-legittimare» l'emergenza attraverso una costruzione discorsiva in grado di proiettare il passato nel futuro e viceversa (Krzyzanowski, 2014, 2019).⁵ Nonostante

un sistema comunicativo stressato dall'emergenza sanitaria (Iannelli, Splendore, Valeriani, & Marino, 2020), nell'agenda dei media si è continuato a parlare di migrazioni rivelando tuttavia un calo rispetto agli anni precedenti (Associazione Carta di Roma, 2020), mentre solo per alcuni leader politici il tema è rimasto presente nelle loro agende (Milazzo, 2020).

5 Caso di studio e selezione del materiale empirico

Si è scelto di prendere in esame il profilo Facebook del segretario della Lega Matteo Salvini che nel 2013 sostituisce Roberto Maroni e prima Umberto Bossi come leader del partito Lega Nord, il quale nel 2017 cambia nome in Lega segnando un'importante ridefinizione ideologica a sostegno di posizioni più vicine ai partiti di destra neo-populista e nazionalista allontanandosi da quelle regionaliste e secessioniste (Albertazzi, Giovannini, & Seddone, 2018). In questo quadro, Matteo Salvini incarna sia una personalizzazione politica che accentua le caratteristiche del leader sopra a quelle di partito sia una personalizzazione della comunicazione (Graziano, 2018). I temi principali veicolati dal leader ruotano attorno a battaglie all'immigrazione definita illegale, a riforme di tipo economico-occupazionale, le battaglie sulla legittima difesa e contro l'UE divenuta il «nemico» del popolo (Albertazzi et al., 2018; Graziano, 2018). Da un'analisi della sua comunicazione su Facebook, Salvini è risultato tra i leader politici italiani che maggiormente costruisce il popolo come nazione o etnia, il più attivo nell'attaccare le élite e nella costruzione dell'«altro pericoloso» con ripetuti «appello al popolo» che scaturiscano nella nota polarizzazione tra «noi» e «loro» come una delle caratteristiche base del populismo (Mazzoleni & Bracciale, 2018).

Dal 1 giugno 2018 al 5 settembre 2019 Salvini ricopre la carica di Ministro dell'Interno e Vicepresidente del Consiglio dei ministri del primo governo Conte, esecutivo costituito da Lega e Movimento 5 Stelle. Viene ricordato per i due «decreti sicurez-

5 Krzyzanowski (2014) ha più volte sostenuto che «la crisi» rappresenta uno strumento di «pre-legittimazione» discorsiva di azioni politiche che, sebbene spesso puramente immaginarie, sono proposte per scongiurare tale crisi. La pre-legittimazione consente agli oratori di presentare le loro posizioni come legittime sebbene non possano renderne prova pratica, non avendo maturato una rappresentazione post-fattuale basata sull'esperienza.

za» e per le numerose battaglie contro le ONG e le imbarcazioni della marina militare continuamente bloccate al largo delle coste italiane con a bordo centinaia di migranti. Tali vicende lo hanno portato a processo con l'accusa di sequestro di persona in relazione al caso della nave italiana Gregoretti e la ONG spagnola Open Arms.

Con oltre quattro milioni e mezzo di followers su Facebook, oltre due milioni su Instagram e un milione e trecentomila su Twitter, Matteo Salvini da alcuni anni rappresenta il leader politico italiano con il maggior seguito nei social media dimostrando un'attività comunicativa divenuta sempre più performante in termini di *engagement*⁶ (Bracciale & Cepernich, 2018). Il segretario risulta, inoltre, il politico che investe maggiormente nella sponsorizzazione della comunicazione sui profili social: nel 2019 l'entourage di Salvini spese oltre novantamila euro per pubblicizzare i post dell'allora vicepremier, mentre nel periodo marzo-dicembre 2020, la pagina Facebook di Salvini è stata destinataria di oltre trecentotrentamila euro.⁷ Il team che dirige la comunicazione è stato definito dallo stesso responsabile della comunicazione, «la bestia» sottolineando l'abilità nella gestione dei social a supporto della strategia politica. L'esempio più significativo è rappresentato da un gioco a premi, chiamato *VinciSalvini*, arrivato alla seconda edizione durante la campagna elettorale delle elezioni del 2018. Il gioco premiava gli utenti che accumulavano il maggior numero di punti attraverso la velocità e la quantità di *like* dati ai post pubblicati del leader nelle diverse piattaforme digitali. Tale gioco, oltre a rappresentare una delle

recenti novità nel processo di popolarizzazione della politica italiana, ha evidenziato la capacità del leader di sfruttare le dinamiche di diffusione consentite dagli algoritmi di Facebook al fine di ampliare il messaggio politico (Ziccardi, 2016). In studi recenti Salvini è stato considerato il leader politico italiano più attivo sui social (Milazzo, 2020) nell'attaccare l'élite, nella diffusione della retorica che contrappone gli italiani ai clandestini (Mazzoleni & Bracciale, 2018) e tra i politici maggiormente propensi a comunicare attraverso la condivisione di aspetti intimi e personali (Rega & Bracciale, 2018). In tal senso, viene riconosciuta l'abilità del leader della Lega nel raccontarsi come figura vicina alla quotidianità dei cittadini attraverso una comunicazione che coinvolge gli utenti spingendoli a commentare alimentando i tassi di interazione e il funzionamento degli algoritmi (Carone, 2021).

I pochi studi interessati alla comunicazione politica del leader durante la pandemia hanno sottolineato la forte persistenza del tema dell'immigrazione nella sua agenda rivelando il successo di tali post rispetto ad altri temi (Cavallaro & Pregliasco, 2021; Milazzo, 2020). Nello specifico il 21% della comunicazione di Salvini su Facebook durante l'estate 2020 ha riguardato il tema dell'immigrazione raccogliendo da questi post il più elevato volume di interazioni (Cavallaro & Pregliasco, 2021).

Considerando l'importanza delle interazioni, il caso di studio ha posto attenzione al rapporto di influenza tra dimensione *top-down* e *bottom-up* al fine di ottenere una visione più estesa del discorso anti-immigrazione. In altre parole, oltre ad analizzare i post del leader, si sono prese in considerazione alcune reazioni generate dagli utenti attraverso la pratica dei commenti in un contesto di *networked publics* (boyd, 2011). Quest'ultimo rappresenta quello stato di connessione che permette agli individui di connettersi con il mondo al di là delle cerchie sociali più ristrette (boyd, 2011) agendo a livello di rappresentazione dei fenomeni sociali che diventano il risultato di una accumulazione di immagini prodotte dall'alto e riprodotte

6 Sebbene il concetto di *engagement* necessiterebbe ulteriori articolazioni, è stato notato che durante la campagna elettorale per le elezioni del 2018 i leader più attivi in termini di frequenza sono stati Matteo Salvini, Luigi Di Maio e Giorgia Meloni con un tasso di pubblicazione di oltre 10 posti al giorno (Bracciale & Cepernich, 2018).

7 Sia per l'anno 2019 che per il 2020 i dati sono stati raccolti attraverso lo strumento di ricerca *Facebook Ad Library* che consente il monitoraggio delle inserzioni pubblicitaria di leader e partiti politici.

dal basso creando un contesto mediale inedito di consumo dell'informazione e di partecipazione al dibattito pubblico (Boccia Artieri, 2012).

6 Metodologia

Il lavoro ha previsto la costruzione di un corpus di testi analizzato con gli strumenti tipici del campo dei CDS attraverso sia analisi quantitative che qualitative (Baker et al., 2008). Il corpus è stato estratto attraverso il software di proprietà di Facebook CrowdTangle il quale ha permesso di monitorare il contenuto della pagina Facebook di Salvini esportandone metriche di base, informazioni sulla tipologia dei post, il loro testo e i dati relativi ai feedback degli utenti.⁸ Le ricerche delle attività della pagina del leader della Lega sono state condotte durante il primo anno di crisi sanitaria tra il 1/3/2020 e il 1/3/2021.

La procedura di analisi ha previsto i seguenti step: 1) archiviazione di tutte le attività della pagina per l'arco di tempo selezionato al fine di ottenere il corpus di partenza; 2) da quest'ultimo si è provveduto a individuare, attraverso l'interrogazione dei testi, i post relativi al tema delle migrazioni creando un sub-corpus di dati relativo al tema;⁹ 3) all'interno di questo sub-corpus ogni post è stato classificato manualmente a seconda dei sotto-temi relativi alle migrazioni quantificando le categorie e analizzando le macro caratteristiche; 4) i post di tale corpus sono stati successivamente ordinati secondo le migliori prestazioni in termini di interazioni generate dagli utenti; 5) l'insieme di questi step ha suggerito l'individuazione delle «tracce» del discorso offrendo un punto di partenza per le analisi delle strategie discorsive condotte su un insieme di testi ridotto.

In relazione alla dimensione *bottom-up*, i commenti degli utenti sono stati selezionati manualmente dai post analizzati

focalizzando l'attenzione sui contenuti con un elevato numero di reactions e/o commenti facendo riferimento al principio della *scalabilità* che permette ad alcuni contenuti di ottenere una visibilità maggiore rispetto ad altri (boyd, 2011). Come accennato nell'introduzione, si è voluto, inoltre, evidenziare il livello di intertestualità del discorso tra i contenuti creati dal leader e i suoi *followers* al fine di individuare i legami espliciti e impliciti tra testi attraverso tempi e spazi differenti (Wodak, 2015). Tale approccio agevola l'individuazione delle strategie argomentative maggiormente riprodotte nella legittimazione e normalizzazione del discorso anti-immigrazione (R3).

Come accennato, il campo dei CDS è caratterizzato dalla demistificazione di ideologie e di dinamiche di potere attraverso un'analisi sistematica di tipologie di testi medialità (scritti e visuali) in grado di decostruire strati di significato soggiacenti al discorso anti-immigrazione messo in relazione all'attuale crisi sanitaria. L'esclusione di rifugiati e richiedenti asilo avviene, infatti, anche attraverso il linguaggio con effetti chiaramente discriminatori (Reisigl & Wodak, 2001) dando vita a costruzioni discorsive che assumono il ruolo di pratica sociale che costruisce significato e assume potere di modellare gli orientamenti socio-politici (Fairclough, Mulderrig, & Wodak, 2011). In questa fase della ricerca, l'analisi non si è concentrata dunque sul conteggio di parole e frasi isolate, ma su elementi in comune che interessano diversi testi seguendo un approccio orientato all'argomentazione (Krzyżanowski, 2019). Nello specifico, si farà riferimento a quelle strategie discorsive che giustificano giudizi positivi o negativi attraverso *topoi* (plurale di *topos*): ovvero schemi argomentativi impiegati al fine di persuadere l'audience della validità delle opinioni e offrendo, al contempo, l'opportunità per un'analisi sistematica delle strategie che garantiscono la transizione da un argomento alla sua conclusione (Wodak, 2015). Il caso di studio prende come riferimento lo schema di *topoi* (Tabella 1) presentato da Wodak & Meyer (2001) e citato in diversi lavori (ad esempio: Hart, 2013; Wodak, 2015, 2017).

8 Per maggiori informazioni e limiti del software: <https://www.crowdtangle.com/>

9 Il testo dei post è stato interrogato attraverso una serie di parole-chiave relative al tema migratorio derivanti dalla letteratura e da un'analisi esplorativa sul corpus di dati.

Tabella 1: Lista di topoi

Utilità, vantaggio, benefico	Farsi carico
Inutilità, svantaggi	Finanza
Definizione	Realtà
Pericolo e minaccia	Numeri
Umanitario	Legge
Giustizia	Storia
Privilegio	Cultura
Responsabilità	Abuso

Nota: Lista presentata da Wodak e Mayer (2001), traduzione dell'autore. Allo schema originale è stato aggiunto il topos definito del «privilegio» introdotto da Hart (2013) come *topos of displacement*.

Tabella 2: Sotto-temi trattati da Salvini nella narrazione dell'immigrazione tra marzo 2020–marzo 2021

Sotto-tema	N
Sbarchi	263
Criminalità e sicurezza	162
Decreto Sicurezza	105
Processi	69
Generale	60
Sanatoria	56
Terrorismo	22
Pro-migranti	3

Nota: Va sottolineato che i sotto-temi non si escludono a vicenda: un singolo post potrebbe contenere più di un singolo sotto-tema. Per tale motivo la somma dei singoli sotto-temi è maggiore al corpus dell'immigrazione (N=594) e i valori percentuali non sono stati riportati in Tabella.

7 Risultati e discussione

Nei prossimi sotto-paragrafi vengono prima presentati i risultati delle analisi quantitative relative alle diverse tipologie di post e sotto-temi (7.1), per poi focalizzarsi sull'analisi delle strutture discorsive (7.2).

7.1 Analisi quantitative sui corpus di dati

Il corpus estratto dalla pagina Facebook del leader della Lega tra marzo 2020 e marzo 2021 è composto da un totale di 4959 post. A partire da tale corpus sono stati individuati 594 post legati al tema delle migrazioni che hanno formato il sub-corpus tematico (N=594) sul quale si sono concentrate le analisi. Va dunque notato che durante il primo anno di crisi sanitaria, il leader politico italiano con la più alta frequenza di post pubblicati nei social media

e di interazioni generate dai post (Milazzo, 2020) dedica in media una notizia su nove al tema delle migrazioni, pari al 12 % del corpus generale.

Come accennato il sub-corpus è stato codificato individuando diverse categorie di sotto-temi (Tabella 2).¹⁰ Il tema «Sbarchi» (263) è presente in poco meno della metà del sub-corpus rappresentando parte considerevole della narrazione dell'immigrazione durante il primo anno di emergenza sanitaria. La centralità di tale sotto-tema trova conferma se paragonato con l'agenda dei media tradizionali nel 2020: se durante l'anno quotidiani e telegiornali hanno parlato meno di migrazioni rispetto all'anno precedente (-34 %), la narrazione è rimasta caratterizzata dalla centralità degli sbarchi come tema che prevale su accoglienza, criminalità e sicurezza e terrorismo (Associazione Carta di Roma, 2020). Il secondo sotto-tema «Criminalità e sicurezza» (145 post) raggruppa i post che narrano la presenza dei migranti attraverso un racconto che mette in primo piano episodi di tensione e allarme sociale includendo quelli dove si menziona la positività dei migranti al coronavirus. Segue il sotto-tema relativo alla modifica del «Decreto Sicurezza» (104) da parte dell'allora governo in carica documentata con dirette video degli interventi degli esponenti del partito nelle sedi istituzionali. I restanti sotto-temi risultano più omogenei nella loro frequenza: i «Processi» (69) che vedono imputato il leader della Lega in relazione alle vicende della nave militare e la ONG Open Arms, il sotto-tema definito «Generale» che include i post che trattano l'immigrazione senza accostarla a una tematica specifica e/o citandola assieme ad altri temi dell'agenda politica (60) e la «Sanatoria» (56) riguardante la regolarizzazione degli stranieri impiegati nel settore agroalimentare, nell'allevamento, nell'assistenza casalinga e nel lavoro domestico. Infine, la categoria «Terrorismo» (22), incentrata quasi esclusivamente

¹⁰ Nella definizione dei sotto-temi si è fatto riferimento al lavoro dell'Associazione Carta di Roma nel monitorare annualmente il racconto delle migrazioni da parte di quotidiani e telegiornali italiani.

sull'attentato di Nizza il 30 ottobre 2020, e un ultimo sotto-tema composto da 3 post nei quali Salvini si serve di un'immagine positiva dei migranti.

7.1.1 *Le migrazioni e la pandemia nella comunicazione di Salvini*

Questi dati introduttivi permettono di approfondire il rapporto che lega il tema delle migrazioni con quello della pandemia (R1): al fine di indagare quantità e forme di questo rapporto, il sub-corpus (N=594) è stato analizzato manualmente al fine di comprendere se ogni post presentasse una relazione con l'emergenza sanitaria nei termini di connettere o citare i sotto-temi con quello della diffusione del Coronavirus. Ne è emerso che in 172 post (29%) è stato possibile individuare tale relazione mentre nei restanti 422 (71%) la narrazione non è stata legata con l'emergenza sanitaria. Un ulteriore approfondimento riguarda quei post che presentano una connessione tra migrazioni e pandemia riferendosi ai migranti quale pericolo per la diffusione del virus attraverso il termine «positivo» o con connotazioni stigmatizzanti come «infetto» o «untore»: solamente 66 post, pari all'11% del sub-corpus, presentano tale relazione.

A fronte di questi risultati emerge che la connessione tra l'immigrazione e l'emergenza sanitaria (R1), seppur presente nel corpus analizzato, non appare una caratteristica strutturale della comunicazione politica di Salvini durante il primo anno di pandemia. Nello specifico, va notato che i migranti come veicolo di diffusione del virus non rappresentano la strategia più frequentemente adottata dal segretario della Lega. Emerge piuttosto che l'emergenza sanitaria è connessa con l'immigrazione in larga parte al fine di delegittimare l'avversario politico sulla gestione del fenomeno (vd. par. 7.2), facendo permanere una narrazione autonoma del tema costruita su elementi noti che non si servono necessariamente della pandemia e del pericolo del virus da parte dei migranti, ma sfruttano uno spettro di tematiche più ampio e consolidato relativo alle migrazioni. In questa direzione è stato possibile analizzare il sub-corpus di dati al

fine di verificare quanti post hanno citato il governo o i loro esponenti attraverso specifiche parole-chiave e / o hashtag: ne è emerso che in 300 post (51%) si menziona governo, ministri o partiti di riferimento evidenziando la politicizzazione come carattere persistente e distintivo della narrazione delle migrazioni durante la pandemia.

7.1.2 *I post con maggiore volume di interazioni*

Tali dati assumono una sfumatura differente se analizzati nei termini di volume di interazioni ed engagement creato dai post da parte degli utenti (R2).¹¹ Prendendo in considerazione l'intero corpus della ricerca (N=5949) appare significativo che alla luce della monopolizzazione del tema della pandemia nelle agende dei media, tre nei primi venti post con le migliori performance riguardano le migrazioni. Ponendo l'attenzione al sub-corpus (N=594) si nota, inoltre, che tra i primi dieci post con le migliori prestazioni, sette riguardano o citano il sotto-tema «Sbarchi» mostrando la sua centralità non solo in termini di frequenza di post prodotti dalla pagina, ma anche in relazione al rendimento delle interazioni degli utenti. Va sottolineato, infine, che cinque tra i primi dieci post presentano un collegamento tra le migrazioni e la crisi sanitaria. Questi dati ci mostrano che la relazione tra migrazioni e pandemia non emerge come dato sistematico nell'insieme del sub-corpus, ma che quando presente essa veicola un elevato volume di interazioni e una risonanza di questo discorso pubblico. A partire da questi dati, nei prossimi paragrafi si pre-

¹¹ Questo parametro è calcolato da CrowTangle confrontando il numero di interazioni che i post di quell'account ottengono dopo un certo periodo di tempo. I *benchmark* vengono calcolati dagli ultimi 100 post di ciascun tipo di post (foto, video, link, ecc.). Retrieved from <https://help.crowdtangle.com/en/articles/1184978-crowdtangle-glossary#:~:text=Overperforming%20is%20calculated%20by%20benchmarking,from%20the%20account>. Va segnalato che il software Crowdtangle non è non è in grado di riportare se un post è stato oggetto di sponsorizzazione o meno.

sentano i risultati delle analisi dei *topoi* e delle strategie discorsive di Salvini e dei suoi followers secondo l'approccio storico-discorsivo all'interno del campo dei CDS (Wodak 2017).

7.2 L'analisi critica del discorso

I dati che emergono dalla CDA e dall'approccio orientato all'argomentazione e all'individuazione dei *topoi* (Krzyżanowski, 2019; Wodak & Meyer, 2001), si allineano con i risultati di oltre trent'anni di ricerche nel campo dei CDS. Le strategie utilizzate da Salvini al fine di legittimare il discorso anti-immigrazione durante l'emergenza sanitaria (R3) evidenziano il consolidamento di una logica binaria e polarizzata che contrappone, mettendoli in competizione, un «noi» umanizzato, legittimato e vittimizzato rappresentato dai cittadini italiani e un «loro» de-umanizzato, delegittimato e criminalizzato rappresentato sia dai migranti che dal governo (Maneri & Quassoli, 2020; Wodak, 2015). Tuttavia, l'articolazione della nota contrapposizione «noi-loro» (van Leeuwen & Wodak, 1999; Wodak, 1996, 2015, 2017) è sviluppata in larga misura attraverso la delegittimazione e la denigrazione dell'avversario politico (Geer, 2006; Hameleers et al., 2017; Johansson & Holtz-Bacha, 2019) con l'impiego di strategie discorsive di legittimazione costruite su elementi di razionalizzazione, richiamo alla morale e all'autorità (van Leeuwen & Wodak, 1999).¹² A supporto di tale schema discorsivo va evidenziato che i sotto-temi più frequenti come gli «Sbarchi», i «Processi» e i «Decreti Sicurezza» mostrano la persistenza di una marcata politicizzazione dell'immigrazione

(van der Brug et al., 2015) caratterizzata dalla scarsa presenza di strategie discorsive di nomina e predicazione verso i migranti (Reisigl & Wodak, 2001) e da uno spostamento del discorso sul piano prettamente politico contraddistinto in prevalenza dal *negative campaigning*. Accanto a questa politicizzazione discorsiva persiste, nonostante sia meno centrale, un racconto dei flussi e dei migranti legato a insicurezza e criminalità rafforzandone il binomio attraverso il pericolo della diffusione del virus (vd. par. 7.2.2). Il legame pandemia-immigrazione e la dimensione del rischio ad esso connessa diventa dunque una risorsa adoperata sia nelle strategie di attribuzione di colpa che nel binomio immigrazione-sicurezza.

Nei prossimi paragrafi verranno presentati alcuni post considerati rappresentativi della comunicazione di Salvini e attorno ai quali si è concentrato la più elevata attività di interazioni che ha prodotto visibilità del contenuto e ha permesso di approfondire le strategie discorsive che hanno costruito il discorso anti-immigrazione articolato attorno ai specifici sotto-temi.¹³ Tutte le immagini sono disponibili nel documento "online supplement".

7.2.1 Gli sbarchi durante l'emergenza sanitaria

Sette post tra i primi dieci presentano il riferimento al sotto-tema degli «Sbarchi» di migranti nelle coste italiane. Gli esempi riportati evidenziando il processo di «drammatizzazione» (Albertazzi, 2007) costruita con l'uso diffuso del «topos del pericolo» in grado di stabilizzare uno scenario di minaccia al fine di cavalcare un' «insicurezza

12 Nello specifico gli autori identificano: 1) *legittimazione attraverso razionalità* che si riferisce all'utilità di pratiche specifiche attraverso una razionalizzazione basata sulla definizione di obiettivi, scopi e benefici; 2) *legittimazione attraverso morale* che fa riferimento a un sistema obliquo di valori astratti (religiosi, diritti umani, giustizia, cultura, ecc.) accennati per mezzo di espressioni che veicolano emozioni; 3) *legittimazione attraverso autorità* che richiama un'autorità istituzionale in-tesa come personale o impersonale, dettata dalla legge, dalla tradizione o dalle consuetudini (van Leeuwen & Wodak, 1999).

13 Nel prossimo paragrafo il nome degli autori dei commenti ai post di Salvini è stato anonimizzato per riservare la privacy dei utenti con profili personali. Le immagini 2, 3 e 5 non presentano dunque la fonte che rimane a disposizione dell'autore. Il nome di Matteo Salvini, assieme a quelli di altri politici intervenuti nei commenti ai suoi post (vd. Immagine 7), non sono stati anonimizzati in quanto personaggi politici aventi pagine pubbliche di Facebook. Tutte le immagini sono disponibili nel documento "online supplement".

percepita», ovvero una insicurezza soggettiva non giustificata da dati. Il primo post è un video pubblicato il 15 novembre 2020 che documenta l'arrivo di un'imbarcazione al porto di Lampedusa ripreso e narrato da un cittadino al fine di assegnare un grado di autenticità alla vicenda. Il post è introdotto dalla frase: «Il grido di dolore di Lampedusa, nel silenzio del governo» e dal testo incorporato nel video: *«fate girare questo video non lo vedrete in tv. Il governo chiude gli italiani in casa ma lascia i porti aperti»*. In modo analogo, il post del 6 novembre 2020 è caratterizzato da un «collage» di elementi che unisce un breve testo scritto (*«Ingiusto, assurdo e pericoloso per la sicurezza del Paese. #Conteincapace»*), un'immagine composta da una fotografia dell'allora presidente del Consiglio Giuseppe Conte e da una raffigurante un barcone di migranti seguite da una didascalia: *«Vietati spostamenti tra comuni ma africa-italia tutto ok!»*. Mentre il primo post agisce sull'attribuzione della colpa verso l'operato del governo in relazione alla gestione degli sbarchi, il secondo post prende di mira una specifica figura politica rappresentando un attacco personalizzato (Geer, 2006).

Tuttavia, entrambi i post connettono il tema degli sbarchi con la gestione politica della pandemia costruendo un discorso in grado di agire su un piano argomentativo duplice e sovrapposto: la contrapposizione «noi-loro» e la delegittimazione dell'avversario politico. Il primo piano agisce attraverso una strategia di collettivizzazione (van Leuween, 1996) che consente di presentare gli italiani come un «noi» caratterizzato da una narrazione non solo implicitamente positiva, ma vittimizzata in quanto costretto nelle abitazioni o da mobilità limitata (*«Il governo chiude gli italiani in casa; vietati gli spostamenti tra comuni»*). Tale contrapposizione, poggiata su opposizioni semantiche elementari, fa affidamento ai topoi dell'«(in)Giustizia» e del «Privilegio» costruiti sullo stesso principio di (in)eguaglianza che legittima la narrazione degli italiani come vittime di un pregiudizio inverso e suggerisce l'urgenza di misure in grado di correggere

tale squilibrio¹⁴ (Hart, 2013). Da un punto di vista discorsivo, presentare gli italiani vittime delle restrizioni offre una maggiore opportunità di massimizzare il senso di ingiustizia e accrescere i sentimenti di indignazione consentendo di sostenere scenari in cui il prototipo ipertipico del cittadino rispettabile è svantaggiato rispetto agli «Altri» e vittima di una presunta ingiustizia (Maneri, 2012). Quest'ultima viene enfatizzata in entrambi i post con la congiunzione avversativa «ma» che introduce l'Alterità come l'elemento di disparità (*«ma lascia i porti aperti»*; *«ma spostamenti africa-italia tutto ok»*). Va notato, tuttavia, che in entrambi i casi non vi è una chiara definizione di un «loro» che ne attribuisce una condizione o una qualità apertamente negativa, ma emerge piuttosto uno stile apparentemente privo di elementi incivili o discriminatori che lascia spazio a un tentativo di razionalizzazione basato su una contrapposizione che sposta il discorso sul piano della delegittimazione dell'avversario politico attraverso il «topos della responsabilità» riferito al governo che chiude *«gli italiani in casa»*. Ciò che risulta imprescindibile in questa narrazione è contestare l'azione di governo e...

... dimostrare che, se anche premier e ministri non hanno responsabilità dirette nella genesi del fenomeno, ne hanno sicuramente nella gestione della crisi, inadeguata o addirittura controproducente. (Battistelli & Galantino, 2020, p. 20)

In tal modo i post enfatizzano la presunta impreparazione dell'esecutivo in materia di immigrazione e di gestione dell'emergenza sanitaria legittimando in ultima

14 Il principio alla base del «topos della (in) Giustizia» ha come riferimento la parità di diritti: *se le persone sono tutti uguali in relazione a qualcosa, allora dovrebbero essere trattate tutte allo stesso modo* (Wodak & Meyer, 2001). Il principio alla base del «topos del Privilegio» si esprime come segue: *se una situazione porta alcuni individui ad essere privilegiati rispetto ad altri individui, si dovrebbe agire per correggere questo squilibrio* (Hart, 2013).

istanza la minaccia alla sicurezza della salute.

Spostando l'attenzione sulla dimensione bottom-up, ovvero sulle reazioni degli utenti, la narrazione di Salvini appare riprodotta in uno stampo disponibile nutrendosi delle retoriche che l'hanno generata (Dal Lago, 2012) mostrando un'intertestualità nelle costruzioni discorsive tra attori mediali *top-down* e *bottom-up*. Ciò è particolarmente frequente in relazione alla pratica di denigrazione dell'avversario politico che caratterizza il discorso di Salvini e quello degli utenti (vd. Immagine 1 & 2). Tra i commenti che ricevono un maggior numero di reactions vanno evidenziate, infatti, alcune immagini che mostrano un'operazione di memizzazione (Mazzoleni & Bracciale, 2019) in cui le foto degli esponenti del governo evocano il «topos della responsabilità» e sono accompagnate da una condanna morale che rafforza la rappresentazione caratterizzata da impreparazione, lasciando di fatto sullo sfondo il discorso sulle migrazioni.

Entrambe le immagini mettono in primo piano la ridicolizzazione degli esponenti dell'allora governo definiti «*la vergogna d'Italia*» e «*Trio Sciagura*». Gli utenti rappresentano *la voce* del «noi» e ricoprono il ruolo di testimoni legittimi in grado di supportare e promuovere la narrazione del leader amplificandone fedelmente il portato ideologico e producendone una sua legittimazione. Tale dinamica è evidenziata dal commento riportato nell'Immagine 3 in cui l'esperienza del singolo individuo, documentata da un testo e una fotografia della propria attività, acquisisce veridicità creando un circuito discorsivo che si autoalimenta.

Siamo di fronte al ricorso di un'esperienza diretta che trasmette autenticità alla realtà drammatica dei cittadini la quale contrasta quando confrontata con i privilegi di cui godrebbero i migranti. Dal punto di vista interdiscorsivo, tali reazioni appaiono come naturali implicazioni della strategia discorsiva suggerita e messa a disposizione come risorsa simbolica dal leader che viene *performata* dagli utenti (Wodak, 2015). Quest'ultimi trasformano le associazioni evocate dal leader (vd. Im-

agine 1) in tesi confermate dai cittadini che utilizzano vecchie e nuove argomentazioni al fine di conferire oggettività alla narrazione. Anche da questi post emerge, inoltre, una campagna negativa che grazie alla dimensione visuale riesce a tenere assieme un attacco di natura personale e uno maggiormente indirizzato a un tema politico (Geer, 2006).

7.2.2 Criminalità e sicurezza

La seconda categoria di post più frequenti è relativa al sotto-tema «Criminalità e sicurezza»: due tra i primi dieci post con maggiori *reactions* presentano un'emozione emotiva che oscilla tra la preoccupazione e l'aperto rifiuto verso l'arrivo e la presenza dei migranti raccontati come i protagonisti di disordini, violenze e criminalità. Nonostante le analisi quantitative non abbiamo evidenziato uno sistematico utilizzo dei migranti come veicolo di diffusione del COVID-19, l'approccio orientato all'argomentazione ha decostruito l'articolazione con le note retoriche securitarie che rafforzano il binomio migrazione-insicurezza. Con il post pubblicato l'8 agosto 2020 (vd. Immagine 4) si introducono alcuni elementi discorsivi apertamente discriminatori e incivili in grado di agire sul piano della discriminazione diretta verso i migranti attraverso un'argomentazione costruita sul «topos del pericolo» che in tal caso assume diverse connotazioni: dalla propagazione del virus provocata dalla presenza dei migranti fino alla loro azione violenta e pericolosa per la cittadinanza.¹⁵

Tuttavia, anche in questo post è presente il «topos della responsabilità» enfatizzato dall'aggettivo «vergognoso» riferito al «#governoclandestino» il quale «*spalanca i porti e permette ai clandestini di infettare mezza Italia*». Il post è l'unico nei primi dieci a stabilire una diretta correlazione tra gli sbarchi e la diffusione del virus nella quale i migranti sarebbero in grado di tentare l'incolumità della salute dei cittadini. Il verbo *infettare* rientra in quella

¹⁵ Tale topos è basato sulla seguente argomentazione generale: *se ci sono particolari minacce o pericoli attesi da una certa (situ)azione o decisione, si dovrebbe agire contro di loro* (Reisigl & Wodak, 2001).

narrazione de-umanizzante che organizza l'esclusione dello straniero...

... intorno ai nuclei della malattia, della protezione dell'igiene pubblica, della purezza, trasformando l'altro in microbo, virus, bacillo, morbo, pestilenza, cancro, tumore, sporcizia, inquinamento. (Volpato, 2011, p. 16)

La natura minacciosa di questa metafora suggerisce la necessità di affrontare l'alterità attraverso misure drastiche che legittimano la politica dei «porti chiusi» come soluzione razionale al blocco dei contagi attraverso una ricontestualizzazione della moralizzazione dei confini (Vollmer, 2017). Parallelamente al pericolo sanitario, il post aggiunge un ulteriore elemento incentrato sul «topos del pericolo» riguardante un presunto episodio di violenza riportato dal quotidiano *Liberio* che avrebbe visto alcuni migranti mangiare i cani di una residente di Lampedusa. Nonostante la vicenda sembra non essere mai stata verificata, il video riporta un contenuto amatoriale servendosi di una narrazione dal basso che lascia la parola ai cittadini nell'etnicizzare il presunto reato e nella de-umanizzazione delle figure dei migranti legittimando un'equazione implicita di immigrazione, disordine e minaccia. L'argomentazione, come accennato, è affiancata dal «topos della responsabilità», per il quale governo diventa «clandestino»: siamo di fronte a un'ulteriore articolazione della contrapposizione «noi-loro» che definisce, attraverso una nota strategia di nomina e predicazione (Reisigl & Wodak, 2001), sia le figure di rifugiati e richiedenti asilo sia il governo. Sebbene in passato, i media italiani abbiano creato un campo di dicibilità per la diffusione del termine «clandestino», rendendolo un'idea di senso comune (Maneri, 2012), oggi giorno buona parte dei media tradizionali evita l'uso di tale etichetta. Come sottolineato da Faloppa (2011), il termine era solito mettere in evidenza il tratto semantico dell'invisibilità degli immigrati, presenti ma poco visibili. Contrariamente, Salvini fa un uso sistematico del termine al fine di mostrare come i flussi migratori siano oggi evidenti e visibili: «Il tratto oggi più

rilevante di «clandestino», [...], non è tanto la «segretezza», quanto l'illegalità» (Faloppa, 2011, p. 68), enfatizzando dunque l'evidenza del carattere criminale sia dei migranti che degli avversari politici al governo. Va notato, infine, l'uso di un registro informale che enfatizza il senso di empatia del lettore («*BASTA, gli Italiani sono stanchi!*») servendosi di una legittimazione morale finalizzata a sollecitare il livello di *intimacy* e prossimità con gli utenti (Mazoleni & Bracciale, 2019).

In questa direzione è interessante sottolineare che anche di fronte a un post con contenuti esplicitamente discriminatori verso i migranti, i commenti con maggior reazioni (vd. Immagine 5) mettono in evidenza un discorso condizionato dall'attacco e dall'attribuzione di responsabilità ai politici al governo diventati capi espiatori (Wodak, 2015).

Ancora una volta i commenti fungono da elementi dimostrativi che avvalgono la convinzione suggerita dal leader politico oggettivando l'atteggiamento di rifiuto verso l'Altro e consolidando un circuito discorsivo che si auto-alimenta. Ciò emerge da questi post è l'abilità del leader Lega nell'orchestrare il pericolo in modi eterogenei servendosi del meccanismo tautologico della paura (Dal Lago, 2012): il nucleo della minaccia, inizialmente declinato nei migranti, al contempo infetti e violenti, è trasferito alla irresponsabilità dell'operato del governo estendendo il processo di securizzazione che diviene legittimato attraverso una razionalizzazione del legame tra immigrazione, illegalità e criminalità (Maneri & Quassoli, 2016).

7.2.3 I processi

Due tra i primi dieci post riguardano i «processi» a carico di Salvini legati alle vicende del 2019 e rappresentano una specifica articolazione del discorso sull'immigrazione del leader della Lega durante il primo anno di pandemia. Il post del 30 luglio 2020 (vd. Immagine 6) rappresenta una delle più comuni strategie di personalizzazione della comunicazione politica attraverso una fotografia di Salvini che incarna un esempio di *self-personalization* atto a mettere in primo piano la centralità del leader attraverso

una forma di auto-rappresentazione fortemente ritualizzata. La fotografia presenta la didascalia «*A testa alta*» che riassume il contenuto del testo riguardante il risultato della votazione del Senato che ha portato a Salvini processo per il caso “Open Arms” dal quale deve rispondere dell'accusa di sequestro di persona plurimo.

Con questo post siamo di fronte a una costruzione discorsiva che mira a rivendicare la violazione delle norme internazionali del diritto del mare, il sequestro di migranti e la sospensione delle operazioni umanitarie finalizzate al salvataggio delle vite. La difesa del suo operato rappresenta la struttura argomentativa costruita su diversi elementi che richiamano strategie di legittimazione razionale, morale e dell'autorità (van Leeuwen & Wodak, 1999). Rivendicando di «*aver difeso l'Italia*», il leader mette in primo piano l'utilità e l'efficacia delle sue politiche contrapponendole all'attuale numero crescente degli sbarchi («*topos dei numeri*») quantificando e rendendo esplicita la pericolosità degli arrivi e dunque (ri)legittimando razionalmente l'azione per la quale è indagato. Rispetto agli altri post, appare evidente il tentativo di adottare una comunicazione che rientra nelle cornici di discorso civile attraverso strategie di legittimazione che si appellano a diverse forme di autorità: quella impersonale della legge citando la Costituzione («*Mi tengo stretto l'articolo 52 della Costituzione*») e quella personale del sapere esperto («*Quando la politica entra nella giustizia, la giustizia esce dalla finestra*») citando una frase di Luigi Einaudi. Accanto a tali elementi il post presenta delle forme di legittimità morale che guidano il senso di giusto e sbagliato facendo riferimento a un sistema obliquo di valori accennati per mezzo di espressioni che veicolano una componente emotiva (van Leeuwen, 1996): «*Vado avanti, a testa alta e con la coscienza pulita, guarderò tranquillo i miei figli negli occhi perché ho fatto il mio dovere con determinazione e buonsenso*». Il riferimento al ruolo del padre buono, alla «*coscienza pulita*» e al «*buonsenso*» agiscono sul piano valoriale veicolando immagini che riguardano la sfera privata e gli affetti del leader. Tutta-

via, anche in questo post, il tema dell'immigrazione funge da dispositivo in grado di indirizzare l'attenzione sull'individuazione del nemico politico rappresentato in questo caso da «*i Palamara, i vigliacchi, gli scafisti e chi ha preferito la poltrona alla dignità*».

Nella sezione dei commenti (vd. Immagine 7) vanno messi in evidenza alcuni esempi di solidarietà provenienti da altri personaggi politici come la leader del partito nazionalista Fratelli d'Italia Giorgia Meloni, e due esponenti della Lega.

Accanto alla manifestazione di supporto al leader della Lega, questi commenti agiscono come sintonizzazione affettiva¹⁶ (Papacharissi, 2015) attorno a un tema personalizzato e intimizzato da Salvini mettendo in primo piano la coerenza narrativa interna del racconto che risulta prevalere rispetto alle evidenze e ai fatti della vicenda giudiziaria da una parte, e ai doveri a cui gli Stati devono adempiere quando si tratta di diritto del mare dall'altra.

8 Conclusioni

Questo lavoro ha analizzato il discorso anti-immigrazione (ri)prodotto nella pagina Facebook di Matteo Salvini durante il primo anno di emergenza sanitaria, approfondendo le strategie argomentative messe in gioco dal leader della Lega di fronte alle sfide poste dalla pandemia. Le analisi esplorative condotte sul corpus di dati hanno individuato alcune macro-caratteristiche della comunicazione tra marzo 2020 e marzo 2021, mostrando che il tema delle migrazioni ha contraddistinto il 12% dell'agenda comunicativa del leader della Lega posizionandosi in linea con altri studi sul tema (Cavallaro & Pregliasco, 2021; Milazzo, 2020).

Dall'analisi del legame tra migrazioni ed emergenza sanitaria sono emersi i risultati maggiormente significativi che non confermano l'iniziale ipotesi della ricerca:

¹⁶ Il termine si riferisce agli *affective publics* ovvero pubblici in rete mobilitati, connessi o disconnessi attraverso l'espressione di sentimenti (Papacharissi, 2015).

in effetti, il discorso anti-immigrazione articolato da Salvini durante la pandemia non è stato prevalentemente articolato sulla connessione tra l'emergenza sanitaria e il pericolo della diffusione del virus da parte di rifugiati e richiedenti asilo. Seppur presente, tale argomentazione non costituisce un dato ricorrente e sistematico della narrazione rispetto all'utilizzo più frequente di altri temi. Va sottolineato, tuttavia, che quando presente la relazione migrazione-pandemia registra un elevato livello di coinvolgimento nel pubblico, veicolando un volume di interazioni per post maggiore alla media e agevolando la viralità di tale narrazione e la sua riproduzione discorsiva. Siamo di fronte, dunque, a pochi contenuti con grande visibilità piuttosto che a una strategia ripetutamente messa in gioco dal leader durante l'arco di tempo considerato. L'analisi esplorativa della dimensione *bottom-up* ha permesso, dunque, di individuare un orientamento maggioritario attorno al tema migratorio fortemente in linea non solo con le opinioni del leader, ma con le medesime strategie argomentative in grado di far riconoscere la voce e l'esperienza del singolo con quella della collettività. Al contempo va sottolineata una scarsa capacità dei *followers* nell'esercitare una *voice* autonoma (Maineri & Quassoli, 2020) evidenziando il carattere intertestuale del discorso in grado di fornire continue fonti di rinnovamento e validazione rendendo autonoma la (ri) produzione e legittimazione discorsiva. Tali risultati sottolineano una sostanziale staticità del discorso anti-immigrazione da parte del segretario della Lega il quale durante l'emergenza sanitaria non ha inserito elementi discorsivi sostanzialmente innovativi.

È emerso con evidenza, invece, una persistenza della politicizzazione del fenomeno migratorio: l'immigrazione ha costituito il terreno dello scontro politico ovvero il luogo in cui il leader della Lega ha dettato le (note) opinioni sul tema (Krzyzanowski et al., 2018), (ri)legittimando la presunta minaccia del fenomeno durante l'emergenza sanitaria, giustificando l'efficacia del suo operato e ricontestualizzando la fortificazione dei confini. La cifra

distintiva di tale politicizzazione è rappresentata dalla delegittimazione dell'avversario politico come carattere trasversale alle diverse categorie di sotto-temi che conferma la centralità dell'attribuzione del rituale del *blaming* (Boni, 2020) come elemento centrale della retorica populista (Hameleers et al., 2017).

Si evidenziano alcuni limiti della ricerca che non hanno permesso un'analisi sistematica della dimensione *bottom-up* limitandosi a un focus su alcuni commenti ritenuti più significativi e coerenti con il frame discorsivo proposto dal leader omettendo le voci di dissenso a tale narrazione. Dal punto di vista della comunicazione *top-down*, la ricerca non ha esplorato la frequenza e il contenuto di altri temi dell'agenda politica al fine di comparare i risultati emersi dalle analisi sul corpus relativo all'immigrazione.

I risultati della ricerca propongono tuttavia possibili nuovi input per tracciare alcune traiettorie nell'evoluzione della normalizzazione del discorso anti-immigrazione (Krzyzanowski & Ledin, 2017; Krzyzanowski et al., 2018; Krzyzanowski et al., 2021) nel contesto della pandemia da parte di partiti populistici attraverso diverse forme di legittimazione (van Leeuwen & Wodak, 1999) che solo in parte hanno visto l'utilizzo di retoriche incivili verso i migranti come veicolo di diffusione del virus. In questi termini la politicizzazione appare fungere da meccanismo di normalizzazione del discorso in grado di spostare l'attenzione da una retorica apertamente discriminatoria verso i migranti al terreno dello scontro politico che sottende una normalizzazione delle discriminazioni e accentua l'invisibilità delle persone che migrano.

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Conflitto di interessi

L'autore dichiara che non c'è nessun conflitto d'interessi.

Materiale supplementare

Il materiale supplementare per questo articolo è disponibile online nel formato fornito dagli autori (inedito).
<https://www.hope.uzh.ch/scoms/article/view/j.scoms.2021.02.013>

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Far-right discourse as legitimacy? Analysing political rhetoric on the “migration issue” in Greece

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Abstract

This article advances research on the normalisation of far-right rhetoric on the “migration issue” by analysing statements from the current Greek prime minister, Kyriakos Mitsotakis, and the ruling political party New Democracy political figures. Having presented the discourse-historical approach (DHA) from critical discourse studies (CDS) as a suitable theory and method of analysis of political discourses, I use an argumentative-based DHA approach and add the argumentative schemes of Aristotelian *topoi* and fallacies to explore how the leadership of the conservative New Democracy government adopted far-right rhetoric on the refugee issue to justify its tough political agenda on security, law, and order. In particular, I focus on the representation of migration as a threat to national security and public health, the politics of hate, and theories of securitisation via an in-depth analysis of the current and former prime ministers’ discourses, the former government spokesman’s statement on the refugee issue and a popular journalist and New Democracy’s MP television interview, and intend to illustrate how extreme right rhetoric could serve the conservative New Democracy’s political strategies.

Keywords

New Democracy, discourse-historical approach, *topos*, fallacy, argumentation, Greek politics, securitisation

1 Introduction

The refugee issue has dominated the Greek political scene since 2015 and was highlighted as one of the main issues of the conservative New Democracy’s election campaign in July 2019. In a polarised climate, New Democracy accused the radical left Syriza of cultivating a welcoming culture for migrants in Greece; and the leader of the conservative party, Kyriakos Mitsotakis, promised to reduce migration by deporting thousands of asylum seekers living on Greek islands back to Turkey. In October 2019, a few weeks after Kyriakos Mitsotakis’ victory in a snap national election, the new conservative government presented its agenda for the refugee issue, which revealed its xenophobic views (Livitsanos, 2019). Deportations, the opening of detention centres, enhancement of borders security, and tougher asylum laws that reduce the safeguards for people seeking international protection synthesise the new government’s policy. The new migra-

tion policy challenges the humanitarian dimension that the Syriza government (2015–2019) had attempted to include in its policy during the refugee crisis in 2015, in contrast to the “closed borders” and “blame gaming” strategies that had been adopted by other European governments (Boukala & Dimitrakopoulou, 2018, p. 183). One of the main points of the new government’s policy was the closure of the Ministry of Migration and the transfer of its responsibilities to the Ministry of Citizens Protection, which is affiliated to the police and related services; a strategy accompanied by the law-and-order dogma that characterises the new conservative government. Moreover, the New Democracy government adopted a new narrative, insofar as Kyriakos Mitsotakis emphasised that Greece faces “a migration problem and not a refugee issue” (Mitsotakis, 2019),¹ a view shared by Makis Voridis and

1 All the extracts which appear in this article have been translated into English by the author.



Adonis Georgiadis, former extreme-right figures who currently serve in the government as ministers and usually refer to migrants who arrive in Greece as illegal (Boukala, 2021). In this article, I emphasise New Democracy's far-right tradition, which has resurged due to the electoral rise of the left since 2012, and present the party's move to extreme rhetoric through the prism of the conservative government's migration policy. In what follows, I first briefly review the political terrain in Greece, from the transition to democracy in 1974 to the election of the radical left Syriza in 2015, and especially the role of the extreme right and its links to the conservative party, New Democracy. In a second step, I present the discourse-historical approach (DHA) from critical discourse studies (CDS) as a suitable method to analyse, understand, and explain the intricate historical and ideological complexities of Greek political discourse. In particular, I introduce a DHA approach to the concepts of Aristotelian *topoi*, fallacies and argumentation strategies (Boukala, 2016, 2019) with which I show how extreme-right rhetoric has been revived and legitimised by the New Democracy party, and shaped Kyriakos Mitsotakis' government's migration policy on the basis of national security and public health. In other words, drawing on the theory of securitisation and the concept of sovereignty, this article explicates the mainstreaming of extreme-right discourse through the prism of the migration issue, which, since 2015 and the then escalation of the refugee crisis, has been a battlefield for European politics and led to the rise of right-wing extremism.

2 New Democracy's ideological transformation in the Greek political spectrum – From Metapolitefsi to the refugee crisis

The Greek political system that emerged after the transition to democracy (*Metapolitefsi*) in 1974 has been characterised by a two-party system. The parties that dominated were the Panhellenic Socialist Movement (PASOK) that developed a

socialist pole in Greece and the conservative New Democracy that among others brought together ex-army officers, ex-junta officials and anti-communists (Boukala, 2021; Nikolakopoulos, 2005; Vernardakis, 2011).

The results of the two 2012 national elections led to the meltdown of traditional political power, while the radical left coalition, Syriza, thrust itself to the forefront of the political stage – an electoral rise that was sealed by the 2015 election victory of Syriza and the formation of Tsipras' coalition government. The rise of the radical left has been described as a result of the delegitimation of the political system, which developed under the impact of Greek socio-political instability and the sovereign debt crisis (Boukala & Dimitrakopoulou, 2017; Verney, 2014). The political transformation in Greece was also marked by the entry of the Neo-Nazi party Golden Dawn into the Greek government and the legitimisation of the extreme right in the Greek political spectrum, through the participation of the far-right Popular Orthodox Rally (LAOS) in the cabinet of Lucas Papademos² (2011–2012). Another important dimension of the political climate of that era was the resurgence of historical dichotomies expressed by a polarising political rhetoric of New Democracy's political figures (Boukala, 2014). In the next paragraphs, I briefly present the ideological roots of the New Democracy party and its links to far-right extremism, which were revived as the party's current leaderships focused on a nationalist, xenophobic and anti-communist agenda as a political strategy against the electoral rise of the left (Boukala, 2021).

In particular, New Democracy's ideological base remained vague from its establishment in 1974 as the party integrated a branch of the pro-junta far-right, and during the next decades was extended from authoritarianism to neoliberalism.

² Lucas Papademos was the former vice president of the European Central Bank, who served as prime minister of Greece in the emergency government following the collapse of PASOK government in November 2011.

According to Vernardakis (2005, pp. 102–103), the political character of the party has been shaped by three different periods: Konstantinos Karamanlis' radical liberalism (1974–1981), the far-right period of Evangelos Averoff (1981–1984) and the neoliberal period of Konstantinos Mitsotakis (1984–1993). Although ideological divergences marked New Democracy's different leaderships in the 1970s and 1980s, the party developed a traditional right ideological tag, in contrast to the other political pole of the two-party system, the socialist PASOK. New Democracy experienced a political transformation under Kostas Karamanlis' leadership (1997–2009), as he attempted to lead the party towards centrism by focusing on middle-ground politics (Vernardakis, 2011) and removing the "curse" of the far-right from the party; a political move that led to the resurgence of the far-right as an autonomous ideological pole and the creation of the LAOS. Antonis Samaras' leadership (2009–2015), accompanied by the Greek debt crisis, led to the revival of the far-right within New Democracy and in Greece in general. Political figures of the Greek far-right who were in the forefront during the period of nationalist fervour in the 1990s, due to the conflict between Greece and the then FYROM – today North Macedonia, over the name Macedonia and Greece's northern neighbour's claim to it, joined Lucas Papademos' coalition government (2011–2012) and thereafter the conservative New Democracy party under Antonis Samaras' leadership (Boukala, 2021). The same figures had also presumed upon the then migration issue in the 1990s, the unlimited arrival of Eastern European immigrants together with the lack of a coherent immigration policy, and communicated their nationalist and xenophobic views from the front stage politics during the refugee crisis in 2015 (Boukala, 2021).

Here, I would like to introduce two significant political figures that move their political views through the political mainstream far from the far-right's sidelines. Firstly, Makis Voridis, founder and president of the far-right Hellenic Front party – a political party that was characterised by its

resemblance with Le Pen's National Front, supporter of the *nouvelle droite*,³ current Minister of the Interior, former Minister of Rural Development (2019–2020), Minister of Health (2014) and Minister of Transport and Networks (2012–2014) in the coalition government under the presidency of Lucas Papademos (2011–2012). Secondly, Adonis Georgiadis, current Minister of Development and Investments, vice president of New Democracy and former Minister of Health (2013–2014), who was also appointed Deputy Minister of Development in the coalition government of Lucas Papademos.

The political heritage of the Greek far-right that was based on anti-communism and ideological dichotomies, established during the white terror against pro-communist and leftist civilians by the national guard militaries and paramilitaries (1945–1946) and the Greek civil war (1946–1949) (Panourgia, 2009), had become mainstream insofar as Samaras' New Democracy adopted an extreme rhetoric developed under the mantle of nationalism and protection of the Greek nation against the Syriza "red menace" and the refugee crisis (Boukala, 2021). In this vein, New Democracy's extreme right tradition that was slowly forgotten as the party embraced the centre, was revived in parallel with divided memories of the past.

In January 2016, the current Greek prime minister, Kyriakos Mitsotakis, was elected president of New Democracy. In contrast to Antonis Samaras' nationalist and polarised agenda, Mitsotakis' election to the party leadership was considered anti-populist, neoliberal and EU-oriented. However, Kyriakos Mitsotakis soon revived the party's far-right tradition by nominating Makis Voridis and Adonis Georgiadis as spokesmen for the party and cultivating polarisation and ideological enmity between right and left (Boukala, 2021). Security became the main issue of his po-

3 By the concept of *nouvelle droite* I refer to the French intellectual movement that developed in the late 1960s, which shaped the ideological roots of the extreme right and was created in opposition to the political heritage of the left (Bar-On, 2011).

litical agenda and a terrain of political juxtaposition that illustrated the regularity of the far-right turn of the party. Migration and the emergence of the refugee crisis (2015–2016) became the number one issue of national security and was discussed on the basis of a far-right rhetoric that reveals the normalisation of the extreme right in the Greek political spectrum, as I attempt to show in the next sections analysing political discourse.

3 Methodology: Synthesising critical discourse analysis and argumentation

According to Norman Fairclough (1993, p. 64) discourse could be considered a “practice not just of representing the world, but of signifying the world, constituting and constructing the world in meaning”. By utilising the term discourse, Fairclough underlines the relation between language and society. In this way, he explicates that discourse contributes to the construction of social identities, social relationships and beliefs of a society’s functions, given that practices are partly discursive and also discursively represented. Different approaches to critical discourse studies (CDS) underline this coexistence, and the discourse-historical approach (DHA) especially considers discourse to be “context-dependent semiotic practices, as well as socially constituted and socially constitutive, related to a micro-topic and pluri-perspective” (Reisigl & Wodak, 2009, p. 89). Hence, the DHA can reveal the links between discursive practices, social variables, institutional frames and socio-political and historical contexts. For this reason, the DHA is a useful theory and method with which to analyse and explain the complexities, and historical and ideological dichotomies employed in Greek political discourse.

As Reisigl and Wodak (2001) further explain, the DHA employs three dimensions of analysis. These are: the specific contents or topics of specific discourses; discursive strategies; and the linguistic means that are used to disclose both topics and strat-

egies (Reisigl & Wodak, 2001). Five types of discursive strategies are involved in constructing a positive Self and negative Other presentation and explicating the main linguistic and pragmatic elements, rhetorical tropes, and argumentative schemes that establish the discursive opposition between “Us” and “Them”-referential or “nomination”, “predication”, “argumentation”, “perspectivisation”, and “intensification or mitigation” (Reisigl & Wodak, 2016, p. 33). In this chapter, I emphasise referential or nomination strategies, which highlight the representation of social actors via the usage of linguistic tropes such as metaphors. I also focus on predication strategies which shed light on the discursive characterisation of social actors. Finally, I emphasise argumentation strategies through which positive and negative attributions of social actors are justified and legitimised (Reisigl & Wodak, 2001, 2016). According to Reisigl and Wodak (2001, 2016) the DHA is distinguished from other schools of critical discourse analysis (CDA) mainly due to its emphasis on argumentative schemes. Thus, here I intend to contribute to the discussion on the relation between the DHA and argumentation by synthesising the DHA and the Aristotelian thought. The concepts of Aristotelian topoi and fallacies are the main argumentative tools of the DHA and ensure an in-depth analysis of the fallacious arguments usually employed by politicians in their rhetoric (Reisigl & Wodak, 2001, 2016), and these can allow a holistic study of the fallacious reasoning and strategies of political communication employed by New Democracy’s political figures. Topoi are integrated into the area of dialectic, which Aristotle calls endoxon (see also Rigotti & Greco, 2019). Endoxon refers to a previous, commonly accepted opinion, whose validity is examined by dialectic syllogism. According to Aristotle (1992), topoi are search formulas that examine endoxon, or common knowledge, and comprise fallacious reasoning. Aristotle uses the concept of endoxon to describe an opinion that can be accepted by the majority of people because it represents traditional knowledge. As he further explains, dialectic topoi are

the means and places for the development of dialectic syllogisms; they are the means by which a dialectician verifies endoxa and solves a dialectic problem through predicables, while *topoi* in *Rhetoric* (Aristotle, 2004) are a means of persuasion.

In *Rhetoric*, Aristotle (2004, B23) categorises the *topoi* that apply to all subjects / topics in common and can be used to explain general arguments that are not referred to specific situations. Rubinelli (2009, p. 84) has noted that the above *topoi* are “argument schemes, they are all devices for arriving at a certain conclusion about a case”. As Boukala (2019) also explains, these *topoi* can be applied to every rhetorical case, while they do not all have universal applicability. Aristotle (2004, B23) provides a holistic classification of *topoi* that can be used by interlocutors to persuade an audience (though they might be named differently) of their argument. For this reason, *topoi* can be useful in a systematic analysis of various discourses. Aristotle also distinguishes between “*topoi* of probative / real enthymemes” and “*topoi* of fallacious enthymemes”; and, as he explicates, via a number of examples, *topoi* are usually expressed by the proposition “if one, then the other” (Boukala, 2019; Reisigl & Wodak, 2016). Thus, *topoi* have a main role in the analysis of argumentation and the formation of argumentation strategies. Moreover, fallacious arguments are widely adopted in prejudiced and discriminatory discourse (Boukala, 2016; Reisigl & Wodak, 2016; Rigotti & Greco, 2019).

Aristotle (1994, 164a 19–21) also defines fallacies by explaining that they are “arguments that appear to be logical refutations, but in fact they are not; they are fallacies (paralogisms)”. Thereafter, Aristotle provides a systematic classification of fallacies that seem to be diachronic, insofar as they can be re-used for the coherence of current political argumentation and can also contribute to the recognition of fallacies that dominate contemporary political discourse. Various scholars and disciplines have focused on fallacies as a means to serve the justification of discrimination and binary oppositions (Reisigl & Wodak, 2001). In particular, the study of

fallacies, like the study of *topoi*, holds an important place in argumentation theory, Pragma-dialectics and the DHA. Van Eemeren and Grootendorst (1987) developed a set of norms for the identification of fallacies and the development of a critical discussion of false reasoning. Hence, an argumentative tactic that violates any of the rules below is evaluated as fallacious. These rules can be summarised as follows:

1. Parties must not prevent each other from advancing or casting doubt on standpoints.
2. Whoever advances a standpoint is obliged to defend it if asked to do so.
3. An attack on a standpoint must relate to the standpoint that has already been advanced by the protagonist.
4. A standpoint may be defended only by advancing argumentation relating to that standpoint.
5. A person can be held to the premises he leaves implicit.
6. A standpoint must be regarded as conclusively defended if the defence takes place by means of arguments belonging to the common starting point.
7. A standpoint must be regarded as conclusively defended if the defence takes place by means of arguments in which a commonly accepted scheme of argumentation is correctly applied.
8. The argument used in a discursive text must be valid or capable of being validated by the explicitization of one or more unexpressed premises.
9. A failed defence must result in the protagonist withdrawing his standpoint and a successful defence must result in the antagonist withdrawing his doubt about the standpoint.
10. Formulations must be neither puzzlingly vague nor confusingly ambiguous and must be interpreted as accurately as possible (van Eemeren & Grootendorst, 1987, p. 284–292).

As van Eemeren, Garssen and Meuffels (2009) further elucidate, if any of the above norms are violated, we are no longer dealing with *topoi*, but with fallacies. Fallacies are analysed in Pragma-dialectics “as dis-

cussion moves which threaten the resolution of a dispute; they are violations of the rules of critical discussion” (van Eemeren & Grootendorst, 1987, p. 297). The DHA also serves to emphasise fallacies and false reasoning. As Reisigl and Wodak (2001, 2016) note, the line between reasonable and fallacious argumentation cannot be drawn clearly in any case. Based on this observation, I would argue that the introduction of a DHA-informed systematic analysis of the Aristotelian tradition can contribute to an in-depth study of those arguments, which reveals the correlation between the far-right and right-wing. Furthermore, it emphasises historical dichotomies that dominated the Greek political scene, and still do. In the next section, I examine the above hypothesis by analysing political speeches and statements of the current and former prime ministers – Kyriakos Mitsotakis and Antonis Samaras respectively, as well as the Greek government spokesman, Stelios Petsas’ statements and New Democracy MP, Konstantinos Bogdanos’ television interview on the migration issue by utilising the three DHA discursive strategies mentioned above and focusing on *topoi* and false reasoning.

4 Analysis: The discursive construction of the threat of migration

New Democracy’s national congress took place in Athens in November 2019, after the party’s electoral success and the formation of Kyriakos Mitsotakis’ cabinet. During the congress, the current president and prime minister of Greece, and former presidents of the party, had the opportunity to discuss New Democracy’s principles and the new government’s political agenda. The former president of the party and prime minister of Greece, Antonis Samaras, underlined the migration issue. As he mentioned in his speech (Samaras, 2019):

We should respect the refugees and offer them hospitality and protection. Asia Minor refugees that arrived in Greece in 1922 did not invade the country. Moreover, Greek immigrants did not illegally enter the countries in

which they arrived. In Greece we have a majority of illegal migrants. We are talking about illegal invaders, mainly from countries where there is no war or other conditions that would justify providing them asylum. Our country is under an informal illegal colonisation. Illegal migration is also a threat to European countries and the European Union.

Samaras juxtaposes the Greek refugees who arrived in Greece after the Minor Asia catastrophe in 1922 and the current refugees who “invade the country”. In this way, he cultivates an antithesis that is amplified through continuous references to “illegal migrants / migration” and the neologism “illegal invaders” (Stamatinis, Archakis, & Tsakona, 2021). Based on homonymy that according to Aristotle is a dialectical tool that examines the relation between different concepts (2004, B23,1401a) or *argumentum ad hominem*,⁴ Samaras (2019) stigmatises refugees as illegal and invaders. Hence, refugees and threat become synonymous via a fallacy of homonymy⁵ that violates logical validity (rule 8) and a correct reference to implicit premises (rule 5). Furthermore, the former prime minister cultivates a climate of fear via a synthesis of the fallacious *topos* of hyperbole⁶ and the *topos* of the consequential,⁷ that here could be labelled the *topos* of the threat of migration and paraphrased as “if migration threatens Greece and Europe, then the new Greek government should stop it”. Hence, Samaras legitimises tough migration policies by presenting the refugee issue as a threat to national security.

4 “A verbal attack on the antagonist’s personality and character that based on homonymy” (Reisigl & Wodak, 2001, p. 72).

5 Two things are homonymous when they are called by the same name but have different definitions (Aristotle, 1994, 165b).

6 A fallacious *topos* that illustrates how the orator construct an argument via hyperboles (Aristotle, 2004, B23, 1401a).

7 A *topos* that shows how the argument is used in order to urge or prevent someone of doing something. As Aristotle claims (2004, B23, 1399a) if an act has both good and bad consequences, then on the basis of the good/bad consequences it can be exhorted / blamed (Boukala, 2019).

The nationalist views of the former prime minister and the polarised rhetoric that New Democracy adopted under his leadership revealed the party's deep right-wing roots that remained obscure. Thereafter, under Samaras' governance and its contribution to the normalisation of far-right discourse, New Democracy MPs of different generations and political statuses openly presented opinions remote from the party's centrist character. A characteristic example of the legitimisation of extreme right-wing views within the party is Konstantinos Bogdanos' references to the refugee issue during a television interview on 23 November 2019 (To BHMAteam, 2019) when he commented that:

Refugees should stay on deserted islands, we cannot forever be tormented by certain taboos or certain sorts of post-civil war or post-dictatorship complexes. Deserted islands are the right place where refugees can be hospitalised ... Refugees cannot have the same rights as the Greek people.

Here, Bogdanos revives haunting memories of the Greek civil war and dictatorship by referring to deserted islands where leftists were exiled and tortured. He attempts to deconstruct the importance that the Greek left have applied to these islands and, in parallel, to validate the exclusion of migrants on the basis of *argumentum ad baculum*, a fallacy that as Reisigl and Wodak (2001, p. 71) further explain, “serves the discrimination of the antagonist by threatening the antagonist with negative sanctions”. In other words, an argument that violates rules 1 and 4 and serves the far-right audience's expectations. The same argument was adopted by the leader of the extreme right party Hellenic Solution, Kyriakos Velopoulos (2019, November 5), who declared that “Greek authorities have to move migrants to deserted islands ... they are illegal”. Bogdanos and Velopoulos, however, should not claim devising the above proposition, which seems to belong to Georgios Karatzaferis, the LAOS' leader who has already proposed that “illegal immigrants should be transported to Makronisos islands” in his 2012 election cam-

paign (Newsroom iefimerida, 2012). Makronisos is one of the main islands used as political prisons and places of torture for many leftists. The repetition of the above statement by far-right figures can be considered relevant to their own polarised and discriminative rhetoric, however, its utilisation by a New Democracy MP illustrates the strategic adaptation of far-right political rhetoric by the party and once again the resurgence of its extreme roots.

The spread of the COVID-19 pandemic in Europe and confirmation of the first case of the virus in Greece on 26 February 2020 led to immigration restrictions, inasmuch as the government conflated the refugee issue and the pandemic. The existence of refugee camps since 2015 and the threat of the pandemic provide a chance to the government to communicate its tough migration agenda and its necessity for the security of the Greek population. According to the government spokesman, Stelios Petsas (2020a):

The confinement of migrants in detention centres is necessary, and it is important for local societies and our country in general. Coronavirus can only be controlled if migrants stay in detention centres. It is evident that matters such as the coronavirus can be dealt with swiftly and effectively in a closed facility, and not an anarchic, open facility, which is a health time-bomb.

In the same vein, the prime minister, Kyriakos Mitsotakis, stated on 27 February 2020 (Mitsotakis, 2020):

The migration issue has a new dimension, given that people from Iran, a country hit by coronavirus, are coming to Greece. Our islands that face public health issues need to be secured. From today, therefore, our country cites Regulation 2016/399 of the European Commission on border controls under Schengen rules, and particularly paragraph 6, on controls to prevent a threat to public health. This means upgrading controls at the Greek border to the highest level for the greatest possible control over the virus' spread ... I have already informed the European Commission of this decision, and it must see this

as a measure to protect health throughout Europe, given that Greece's borders with Turkey, North Macedonia and Albania are also the external borders of the EU.

The above extracts illustrate the government's political strategy to justify its strict migration policy by comparing the two issues – migration and the pandemic – and representing migrants as potential carriers of the virus and a threat to public health via the Aristotelian *fallacy due to consequence*⁸ or *argument as misericordiam*,⁹ which violates rules 8 and 4, insofar as the argument presented by the two politicians is not valid or capable of being validated by the explication of one or more unexpressed premises. Moreover, Petsas' description of the open facilities that were constructed on the basis of Syriza's migration policy as anarchic and a "health time-bomb" criticises the previous government by underlining its deleterious political decisions via the Aristotelian topos of the consequential or the topos of the threat of migration (see above), which consist of positing a dichotomy between two political poles and their different migration policies. In addition, Mitsotakis' references to the EU and Europe's borders and the stigmatisation of Iran and Iranian migrants represent the Greek government being responsible for European public health, which it secures through its restrictive migration policy. An argument that is further developed through the Aristotelian topos of analogue consequences¹⁰ or the DHA topos of re-

sponsibility,¹¹ which is here based on the logic "if the Greek government is responsible for the national and Europe's security and public health, then the government should stop migration and secure European borders".

Another important case study that illustrates the government's emphasis on the borders as national and European was the tension that was created in the Greek-Turkey border region of Evros when migrants, supported by the Turkish police, attempted to cross the Greek border in March 2020. As Stelios Petsas (2020b) explained in his statement regarding the decisions of the Government Council of National Security:

Greece is experiencing extraordinary and organised pressure by mass population movements. These people are attempting to enter Greece by using violence, and thus the country is under an active, serious, extraordinary, and asymmetrical threat to its security. For this reason, the Greek government announces that the country will upgrade its security to the maximum possible level across the country's eastern border by strengthening its police and military units. Greece will also suspend all asylum applications for one month for those who enter the country illegally. Greece will also request emergency assistance from the European Union due to the current extraordinary situation.

By recontextualising the concept of *asymmetrical threat* that was used by the US authorities during the Cold War and was rediscovered to characterise terrorism (Stepanova, 2008), the spokesperson focuses on the danger that Greece is facing and justifies violence in an attempt to defend national security and territory. According to Stelios Petsas, state apparatuses, such as the military and the police, ensure the national safety and the

8 According to Aristotle (1994, 167b) the fallacy due to consequence is used to show that the implication is convertible. For instance, it is considered that it was raining because the ground is wet and when it rains the ground becomes wet.

9 As Reisigl and Wodak (2001, p. 72) explain, "an argument consists of unjustifiably appealing for compassion and empathy in cases where a specific situation of serious difficulties intended to evoke compassion and to win an antagonist over to one's side is fake or pretended".

10 A topos that explains that an argument is derived from analogy in things (Aristotle, 2004, B23 1399b).

11 According to Reisigl and Wodak (2001, p. 78) the topos of responsibility "can be summarised by the conditional formula: because a state or a group of persons is responsible for the emergence of specific problems, it or they should act in order to find solutions of these problems".

Greek government requests “emergency assistance from the European Union due to the current extraordinary situation.” In this way, the Greek government cultivates a climate of fear that is also based on the topos of the threat of migration (see above). In contrast to Antonis Samaras’ rhetoric, which represented migrants as invaders in a fallacious and ambiguous way, this time the threat becomes real, insofar as the Greek government underlines the migration issue and not the conflict between the two countries: Greece and Turkey. The asymmetric threat definition was also shared by far-right figures, such as Kyriakos Velopoulos and Ilias Kasidiaris, the former spokesperson of Golden Dawn and leader of the new extreme right party, Greeks for the Fatherland, as an appeal to anti-migration and nationalist emotions. Hence, in New Democracy’s discourse, the refugee issue is linked to national imaginaries, sovereignty, securitisation, and migrants through fallacies, and these topoi are presented as a severe threat to national security and public health.

5 The enemy at the gates: Talking about securitisation and sovereignty

Greece faced a refugee crisis in 2015 that led to a polarised climate and questioned European solidarity (Boukala & Dimitrakopoulou, 2018). The then Greek government’s (Syriza-led coalition government) policy on migration manifested a desecuritisation strategy, although it failed to produce the anticipated results (Skleparis, 2018). In contrast, the current New Democracy’s government has constructed its migration policy on the basis of securitisation. Drawing upon Carl Schmitt’s (1932) political theory and speech acts,¹²

the theory of securitisation was developed to explain how political elites justify their policies in the name of security in a discursive way (Balzacq, 2005). As Boukala (2019) observes, according to McDonald (2008, p. 567), securitisation can be defined as “positioning through speech acts that are usually announced by political leaders and pertains to a particular issue, such as a threat to survival, which in turn enables emergency measures, with the consent of the relevant constituency, and the suspension of ‘normal politics’ in dealing with the issue”. According to Rampton, Charalampous and Charalampous (2014, p. 3) “securitisation refers to ‘existential threats’ that mean threats to the very existence of the state and lead the authorities to move from the realm of ordinary politics into the realm of exceptional by adopting strict measures against the potential danger”. Hence, securitisation is based on the discursive construction of a threat, which could lead to the reinforcement of the state power while rights could be suspended via the “state of exception” (Agamben, 2005). Indeed, as Balzacq (2005, p. 179) notes, “securitisation is a rule-governed practice, the success of which does not necessarily depend on the existence of a real threat, but on the discursive ability to effectively endow a development with such a specific complexion”. In this vein, security is applied as a speech act; it does not always refer to an existential threat but represents a threat and claims a specific right to use whatever means necessary to fight it (Waeber, 1995). Security, then, is linked to an imagined threat that is developed through a speech act utilised by political elites and state apparatuses. According to Williams (2003, p. 514), what makes a particular speech act a part of securitisation is the reference to “an ‘existential threat,’ which calls for extraordinary measures beyond the routines and norms of everyday politics”. The theory of securitisation and the discursive emphasis on a threat dominates New Democracy’s rhetoric on migration and forms its migration policy on the basis of exclusion and national security. It

simply report states of affairs and are thus subject to truth and falsity tests.

¹² Following Austin’s perspective, Balzacq (2005, p. 175) explains that the basic idea of speech act theory is based on the principle that certain statements do more than merely describe a given reality and, as such, cannot be judged as false or true. Instead, these utterances realise a specific action – they are performatives as opposed to constatives that

also contributes to the discursive opposition between ‘us’ and ‘them’, migrants, who, as Konstantinos Bogdanos claimed, “do not have the same rights as Greeks” (To BHMAteam, 2019).

The securitisation framework, especially its earliest *Copenhagen model* has been criticised as elliptical or narrow, because it is exclusively focused on speech acts and the discourses of dominant actors, such as political leaders, and institutions, i.e., the State (Balzacq, 2005; McDonald, 2008; Williams, 2003). I argue that the DHA and especially its argumentation strategies contribute to the study of the discursive construction of a threat and overcome limitations that are relevant to the political concepts of securitisation theory by emphasising linguistic means and their links to power relations and ideology. By presenting the topos of the threat of migration and focusing on the fallacious arguments used by New Democracy’s figures, I assume that the issue of national security and how it was discursively developed by current and former prime ministers, government spokespersons and the New Democracy MP Konstantinos Bogdanos has been analysed in a holistic way via the DHA that surpasses the limitations of speech acts and the “existential threat” emphasis. Drawing upon argumentation strategies, I attempted to show the juxtapositions between far-right discourse and New Democracy’s rhetoric on migration and reveal the strategic resurgence of New Democracy’s extreme right roots.

According to Brown (2010, pp. 47–48), “[w]e speak of sovereignty today as if we know what we mean when we discuss its existence, achievement, violation, assertion, jurisdiction, or even waning. Yet sovereignty is an unusually amorphous, elusive, and polysemic term of political life”. Hence, sovereignty and borders are interlinked, insofar as the borders demonstrate the nation-state’s sovereignty (Brown, 2010). Moreover, borders add an imaginary dimension to sovereignty by creating an “imaginative geography” (Said, 1991) or a sense of belonging within a common territory (Anderson, 2006). Thus, boundaries compose not only geographical limits

but also a common, national identity and a distinction between “us” and “them”. As Brown (2010, p. 69) further explains, “today, there is incitement to xenophobic nationalism and a call for states to close and secure national borders from nation-states’ populations anxious about the migration ‘threat’”.

In this climate of insecurity and xenophobia, closing borders is a practice of state protectionism or a state of exception (Agamben, 1998, 2005) that seeks to reduce the population’s insecurity by keeping the “threat” outside national borders, thus validating the nation-state’s juridical rules. Wall functions as a symbolic means that signifies borders and the opposition between ‘us’, inside the borders, and ‘them’, who are outside and need to be blocked. Walls draw upon the concept of nation-state sovereignty and the demarcation of nation-state boundaries. As Brown (2010, p. 40) further explicates, “walls defining or defending political entities have shaped collective and individual identity within as they aimed to block penetration from without”. Thus, New Democracy’s emphasis on invasion and asymmetric warfare legitimises the nation-state’s strategy of exclusion / inclusion and provides a fallacy of protection from an alien danger that threatens national security and public health.

Sovereignty, border controls, and the discursive construction of a common enemy contribute to the acceptance of state politics which, in the case of New Democracy’s rhetoric on the refugee issue, could be described as a “state of exception” (Agamben, 2005) that justifies a tough migration policy via argumentative schemes presented as topoi and fallacies and the normalisation of far-right discourse.

6 Conclusion

“Benefits should be provided for children born by Greek parents only” (Newsroom iefimerida, 2019) announced Konstantinos Kyranakis, a New Democracy MP and former president of the Youth of the European People’s Party. A statement empha-

sised New Democracy's turn to nationalism and it would not have been a paradox if it were stated by a member of political parties that are on the far-right of the Greek political spectrum.

By emphasising argumentative schemes such as Aristotelian *topoi* and fallacies through the prism of the DHA, this article offers insights into the narrative persuasion adopted by New Democracy to legitimise its strict migration policy. By equilibrating democracy and human rights, and absolutism and racism within the ambiguous limits of a "state of exception", Kyriakos Mitsotakis' government is seeking a position on the right of New Democracy's centrism, insofar as it shares a far-right rhetoric. Securitisation and the discursive construction of migration as an existential threat dominate the discourses of the political figures under analysis and lead to a dichotomy between an external and dangerous "them" and a "we" under threat. Nation-state imaginaries and strategies of exclusion are applied via specific fallacies and *topoi* that are used by New Democracy figures to persuade their audience of the validity of their arguments. By utilising the DHA and emphasising argumentation strategies, I underline micro strategies of securitisation and surveillance (Bigo, 2006) that were used by the current government to justify its migration policy. I also assume that the usage of far-right rhetoric due to the migration issue by the New Democracy leaderships and members is not accidental, quite to the contrary it is an *aporia* of the extreme right values of the party that revived during the electoral rise of the left and Syriza's coalition government in 2015. Far-right discourses and attitudes shape New Democracy's political strategy and are expressed via the *topos* of threat of migration and in the name of Greek people's safety.

To conclude, "the politics of fear" (Wodak, 2015) is used by political leaders to disseminate ambiguous political decisions at critical times and is linked to the mainstreaming of far-right discourses and strategies. Following Wodak's view and the multiple dimensions of the DHA, I have shed light on the resurgence of the

far-right values of the conservative New Democracy by examining, in depth, its members' discourses on the migration issue and the national security that illustrate the revival of the party's extreme voices as an *aporia* of the party's de-demonisation of its extreme ideological roots.

Conflict of interests

The author declares no conflict of interests.

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From the illegal migrant-criminal to the illegal migrant-invader: Critical analysis of the semantic change of the Greek term λαθρομετανάστης “illegal migrant”

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Abstract

Following a critical discourse analysis (CDA) approach, the present study reports on the analysis of 49 texts from the Hellenic Parliament Proceedings, where the term λαθρομετανάστης “illegal migrant” is used. The texts under scrutiny date back to 2015 (i. e., the year the migration crisis reached its peak) and reveal the re-contextualized use of this term, which is identified with the hegemonic national-racist discourse of the 1990s perceiving migrants as criminals. Since the 1990s, the term has been stigmatized by political correctness as racist and inaccurate. We consider political correctness as a type of corrective practice, since it detects naturalized language uses reproducing stereotypes and power relationships. We will examine how the re-emergence of the older, racist use of the term in question as a reaction against the guidelines of political correctness is anew connected with national-xenophobic discourse and, in particular, with framing migrants as invaders and a national threat. Overall, tracing the semantic trajectory of the term λαθρομετανάστης “illegal migrant” allows us to explore how language use at the micro-level is dialectically connected with discourses at the macro-level.

Keywords

migrants, political correctness, critical discourse analysis, parliamentary discourse, semantic change, migration crisis, Greece

1 Introduction

In 2015, Greece was faced with two huge challenges, while also dealing with an economic recession and the subsequent collapse of how the country saw itself at global stage. One of these challenges was the election of the Left to the government and their tough negotiation with the country’s creditors and the European Union; the other was the migration crisis.¹ During the

latter, the country found itself in the middle of an emergency, as it had to choose between two management policies: the policy of accepting migrants and the policy of excluding them. For legitimatizing each of the above ways of management, corresponding discourses were reproduced.

In this paper, we contribute to the study of political communication in the Greek context and follow a critical discourse analysis (CDA) approach by tracing the semantic trajectory of the Greek term λαθρομετανάστης “illegal migrant” to refer to the migrants Greece received in 2015.

1 We acknowledge that the terms μετανάστης/immigrant and πρόσφυγας/refugee do not have the same meaning. If, however, the distinction between them is based on the *need* some people have to move to a new place for various reasons, it is likely that the subtle, technical differences between the two terms are not that important and the critical question concerns how they are treated

in the host communities. Therefore, in this study we will not insist on distinguishing between the terms μετανάστης/immigrant and πρόσφυγας/refugee and will use the terms *migrant* and *migration* throughout.



More specifically, we explore the public debates about the (in)appropriateness of the term through the dialectic relationship between the micro-level of personal linguistic choices and the macro-level of the discourses concerning the migration crisis and its management (Blommaert, 2005).

We consider that in the semantic trajectory of the Greek term λαθρομετανάστης “illegal migrant”, a catalytic role was played by political correctness, which we will approach as a linguistic *corrective practice* (Moschonas, 2005) and as a form of *verbal hygiene* (Cameron, 1995). Assuming that the generalized use of a lexical item is supported by hegemonic discourses, we will investigate how, through the attempt of a corrective intervention, political correctness highlights the hegemonic, naturalized discourse hiding behind the generalized use of the term in question and simultaneously suggests a new term attempting to avoid the racist content of the previous one.

In the end, taking into consideration the corrective interventions of political correctness as well as the various socio-political circumstances in Greece, we examine the use of the term in a corpus of 49 texts from the Hellenic Parliament Proceedings, classifying the distribution of the term per political party. In other words, we examine how political correctness ideologically stigmatized the term, so that it ended being used only by specific political parties. Then, we will analyze the co-texts in which this term appears, comparing our conclusions with the existing bibliography concerning the use of the term in the 1990s. Our general aim is to examine how the term λαθρομετανάστης “illegal migrant” as a means to refer to migrant populations was recontextualized (at the micro-level), and eventually how using or avoiding it was linked to the opposing discourses concerning the migration crisis (at the macro-level).

2 Theoretical background

In the present study, we follow the approach and theoretical assumptions of

critical discourse analysis (CDA). CDA traces and scrutinizes *discourses*, namely representations of reality from specific points of view (Fairclough, 2003; Kress, 2010). Relevant studies focus mainly on institutional, political, and media texts, because “these texts have a broad distribution, while they constitute the most important source based on which we form our perception of social and political reality” (Stamou, 2014, p. 152).

A basic CDA assumption is that discourse practices and social practices are constantly in interaction (Archakis, 2020; Blommaert, 2005; Cooke & Simpson, 2012, p. 118; Zotzmann & O’Regan, 2016, p. 114). The research objective of CDA is to examine how texts cover up or even incubate social discrimination phenomena such as sexism and racism (Fairclough, 1995, p. 217). In other words, in the center of its attention is the point of view of those who are denigrated and marginalized by those in positions of power. CDA thus studies the reproduction of social control, dominance, social discrimination, and social inequalities in general through discourse (see among others Benwell & Stokoe, 2006, p. 105; Fairclough, 1989, 1992; Stamou, 2014; van Dijk, 2008; Wodak, 2011).

One of the most important research areas of CDA involves the dialectic relationship between the macro-level and the micro-level (Bennett, 2018, p. 3; Benwell & Stokoe, 2006, pp. 44–45; Blommaert, 2005, p. 25; Stamou, 2014, pp. 149–150; van Dijk, 2008, pp. 87–88). At the macro-level, one traces the discourses with their value standards and their dictates (social, linguistic, educational, etc.). Hence, at the macro-level we can detect, *inter alia*, the dominant national-xenophobic discourse. At the micro-level, one detects the various social (linguistic, communicative, semiotic, etc.) choices, practices, and eventually positionings of speakers toward the discourses of the macro-level (Bucholtz & Hall, 2005, p. 591). It could therefore be suggested that the macro-level, formed by dominant discourses, constitutes the *structure* which defines and limits *agency* at the micro-level (Giddens, 1984). The macro- and micro-levels are not considered to

be two distinct poles of a vertical dichotomy (Blommaert, 2015). This distinction is employed only for analytical purposes, given that during social practices the two levels are constantly intertwining: agency at the micro-level is framed and fueled by discourses at the macro-level, which are either reinforced or questioned through agency (Baxter, 2016; Horner & Bellamy, 2016, pp. 322–326; Macgilchrist, 2007).

The proposed analysis is based on the premise that discourses about migrants are often considered as ways to legitimize and justify the policies for the integration of the latter in the nation-state or their exclusion from it. In the present study, at the macro-level, we detect the discourses concerning the Greek management policies for the migration crisis of 2015. In particular, we draw on the distinction made by Triandafyllidou (2018, pp. 14–15) between two opposing discourses. The first one advocates the moral obligation and solidarity the country is expected to show towards migrants by highlighting their experiences (see also De Fina, 2020). Against it, rises a second discourse according to which migrants are a threat and should therefore be excluded. In other words, the *moral obligation/solidarity* discourse stands against the *threat/exclusion* one. We will connect the latter with the national-xenophobic discourse, which dominates public debates since the 1990s and seeks for a “solution” to the “problem of the influx of immigrants” (Christopoulos, 2020). The *moral obligation/solidarity* discourse will be linked with the pro-migrant, humanitarian discourse, in which “the people moving are seen as victims” (Triandafyllidou, 2018, p. 14).

In the light of the distinction between the two discourses at the macro-level, we trace the semantic trajectory of the Greek term *λαθρομετανάστης* “illegal migrant” at the micro-level, from the beginning of the 1990s until about the mid-2010s, and then we examine its uses in Greek parliamentary discourse. Emphasis is placed on the debates about how the term is used, that is, on its recontextualizations through its dialectic relationship with the above-mentioned discourses about migration. The

corrective practices of political correctness play a significant role in such recontextualization.

3 Political correctness as a corrective practice

Cameron (1995, p. 127) observes that for most people the content of the term *political correctness* depends on context. Political correctness is an especially complex phenomenon, the characteristics of which have changed radically during the past few decades (Hughes, 2010). An important step in conceptualizing the phenomenon is drawing a distinction between political correctness and its myth (Wilson, 1995). As myth of political correctness we consider every perception of it as the result of conspiracy processes and organized networks that impose a *thought police*. This mythology is constructed via circulating made up or real stories about its extreme interventions and stigmatization of linguistic and other behaviors. Moreover, the myth was constructed owing to the representation of political correctness as triggering *moral panic* mainly in the American public sphere (Cameron, 1995).

In the present study, we will not examine the myth of political correctness *per se*. Instead, we perceive political correctness as a process that concerns language. We define political correctness as a field correlating language to ideology in the context of corrective practices. Moschonas (2005) suggests that corrective practices almost always take the form of corrective guidelines. Indeed, the supporters of political correctness explicitly state the need to replace the “wrong” word that contains negative evaluations, with a new “right” one, which does not contain negative evaluations. Cameron (1995, pp. 143–147) mentions as a typical example the contrast between the “forbidden” words *black* or (the even more offensive) *nigger* and the politically correct word *African-American*. The first two words are chosen when describing a group of people based on their skin color. This gives the impression of a supposedly objective representation of

reality, although it is actually a way to approach and classify this group in the light of a hegemonic discourse. The politically correct term, on the contrary, is suggested as appropriate for replacing the previous terms by emphasizing the history and the roots of the community rather than the skin color of its members. As Cameron (1995, p. 145) observes,

the meaning of such a gesture has to be understood in the context of history: for a group brought to America as slaves and until very recently denied the rights of American citizens, this assertion of identity also represents a claim of the uprooted to historical roots (“African”) and of the historically unequal to full equality (“American”).

The ultimate aims of political correctness are speakers’ compliance with the corrective guideline and their avoidance of racist, offensive, etc. language uses. The main goal of such corrective processes is to highlight that naturalized lexical items imposed by the hegemonic discourse of the white, Western, wealthy and heterosexual man are not at all neutral but negatively stigmatized in a way that they marginalize specific social groups. As already pointed out, political correctness is, first of all, a practice related to language and, more specifically, to the use of lexical items, as it introduces new terms or redefines previous ones. In this respect, it falls under the linguistic phenomenon of *renaming*, that is, the change of the signifier of a signified by using another new or preexisting signifier (Xydopoulos, 2008, p. 271).

At the same time, the social and historical circumstances which give birth to specific language uses and meanings are highlighted through the corrective practices of political correctness.² Corrective practices function as interventions at the micro-level of specific hegemonic language uses with the aim of stigmatizing

them, and reveal the hegemonic discourse that fuels them at the macro-level. For ease of comprehension, the process of political correctness is described below in the form of specific stages / steps:

- › First, activist organizations and intellectuals detect a lexical (or grammatical) item carrying offensive or degrading connotations for specific social groups. An effort is thus made to restrict the extent to which the item in question is acceptable as “neutral”. In other words, the denaturalization of this lexical item is attempted (Blommaert, 2005, pp. 25–26).
- › Then, a new, politically correct word is proposed to replace the old one. This new word is coined to question the evaluative connotations of the old one and eventually to assess the reality to which reference is made from a new point of view (Cameron, 1995). Coining new words next to old ones creates conflict inside the linguistic community, which is expressed by defending the old or the new word. Thus, choosing one word or the other is evaluatively / ideologically colored in a salient manner.
- › The supporters of the new, politically correct word try to entrench the replacement of the old word by turning to official bodies and institutions or by propagating their positions through the press, arguing about the need to replace the old word with the new one (Fairclough, 2003, p. 21).

One of the first and most characteristic conflicts about politically correct uses of terms in Greek public discourse is the discussion concerning the “right” way to refer to migrants. In the beginning of the 1990s, the transformation of Greece from a country of emigrants into a host country for migrants (Karatinos, 2001) brought Greek society in front of a new reality. The population census of 1991 estimated that the migrant population in Greece was 161 000 people. Ten years later, according to Hellenic Statistical Authority data, the number of migrants in Greece increased

2 In this sense, political correctness could be seen as an application of CDA’s theoretical assumptions, on the grounds that CDA aims at highlighting social inequality as created, expressed, signified, and legitimized in and through discourse.

to 761 813 (Kotzamanis, Agorastakis, Pilidis, & Stathakis, 2006).

4 The recent history of the Greek term λαθρομετανάστης “illegal migrant”

This section provides a brief overview of the literature concerning the semantic evolution of the term under scrutiny. The initial generalized use of the term portraying migrants as criminals seems to be later on stigmatized, and hence more politically correct terms are sought for to replace it.

4.1 Illegal migrants as criminals:

The generalized use of the term in the 1990s

The bigger the number of migrants a country hosts, the more hegemonic anti-migrant discourse becomes (Wodak, 2015). This was also the case with Greece during the 1990s, when the migration issue was considered to be a solvable problem. In the middle of the decade, and in the absence of an organized plan to handle the new situation, mainstream media, parliamentary parties, state and public authorities supported a xenophobic discourse including an exaggerated representation of the conditions of the undeclared work done by migrants and eventually their connection with criminality (Figgou, Sountzias, Bozatzis, Gardikiotis, & Pantazis, 2011; Gropas & Triandafyllidou, 2005).

This criminalization of entire communities of migrants was organized mainly via using the term λαθρομετανάστης “illegal migrant” (Karydis, 2004, p. 216). Etymologically, the use of the Greek terms λαθρομετανάστευση “illegal migration” and λαθρομετανάστης “illegal migrant” attributes two different but interconnected characteristics to the process of migration: it is illegal and hence it is concealed. Λαθρομετανάστης “illegal migrant” is a compound word produced by the adjective λαθραίος “illegal, unlawful, latent, concealed” and the noun μετανάστης “(im)migrant”. Migrants seem to retain the identity of the “illegal” not only when crossing the Greek borders, but also

during the whole time they reside within them. Simultaneously, they retain the identity of the “latent” living out of state custody and welfare, since they live inside the Greek territory but, at the same time, they are at its margins. By using the term λαθρομετανάστης “illegal migrant”, Greek speakers draw lines distinguishing *Us* from *the Others*, the latter becoming unwanted on the grounds of being associated with criminality (King & Wood, 2001; Pavlou, 2001). Thus, they are deprived of the right to coexist on equal terms with the “legal” citizens of the country.

In an attempt to trace the semantic trajectory of the term λαθρομετανάστης “illegal migrant”, we looked it up in some of the main dictionaries of Modern Greek. The entry is absent from the *Great dictionary of the whole Greek language* (Dimitrakos, 1936–1953), although several entries can be found in it having as their first component the adjective λαθραίος “illegal, unlawful, latent, concealed”. The entry is not found either in the more recent *Dictionary of the Modern Greek language* (Stamatakos, 1952–1955). It cannot be detected either in the *Contemporary dictionary of the Modern Greek language* (1991). The word begins to show up as a separate entry in the two major dictionaries published in the second half of the 1990s: *Dictionary of Modern Greek* (Babinotis, 1998) and *Dictionary of Standard Modern Greek* (1998). Finally, it appears in the most recent *Utilitarian dictionary of Modern Greek* (2014). It should be noted, however, that the term was not coined during the 1990s. It occurs in newspapers since the Interwar Period (Sarantakos, 2009). It appears that these are sporadic uses of the term and that its use became frequent and consistent much later, namely from the 1990s onwards. It therefore seems that an old word which is not particularly common was chosen to become one of the basic ways to refer to migrants who arrive in Greece initially from the Balkan area (mainly from Albania) and later on (i. e., 2015 onwards) from Muslim countries.

In early 1990s in Greece, not only were most migrants typically illegal and ignored by labor law, the state, and public opinion

(Mousourou, 1991, p. 105), they were also linked with delinquency and criminality, as the use of the term *λαθρομετανάστης* “illegal migrant” shows. There is a great number of studies with data from the Greek press, which highlight exactly this connection (see among others Karydis, 1996, 2004; Konstantinidou, 2001; Kountouri, 2008; Vamvakas, 1997). Karydis (2004, p. 216) in particular refers to a “process of criminalization and social construction of the migrant-criminal”.³ The problematization of the mass arrivals mainly of Albanian migrants is based on the correlation of these arrivals to the rise in criminality in Greece in line with a cause-and-effect logic. This arbitrary correlation was not based on any data but on stereotypes entrenched through media and political discourse and suggesting that migrants were criminally inclined (Archakis & Tsakona, 2021). In this context, the term *λαθρομετανάστης* “illegal migrant” has functioned as a linguistic means for explicitly expressing political positions against migrants and stigmatizing them as unwanted and dangerous for public security.

4.2 The corrective practice as a means for the stigmatization of the term

As discussed in section 4.1, the term *λαθρομετανάστης* “illegal migrant” emerged in the 1990s as a prevalent lexical way for reproducing the negative stereotype connecting migrants with criminality. De Fina (2020) observes that anti-migrant discourses are widespread and entrenched, resulting in migrants and their supporters trying to construct different representations of themselves through activist actions and through their participation in social networks and alternative media. In fact, in recent years alternative humanitarian discourses have become more and

more accessible to the wider public and are constructed as a means of opposition to anti-migrant ones. In Greece, part of the effort to highlight alternative humanitarian discourses is political correctness including the corrective practices that aimed, and still aim, at eliminating the use of the term *λαθρομετανάστης* “illegal migrant” and at pinpointing and combating the respective racist stereotypes.

Early on, the occurrence of the term in extreme xenophobic contexts brought the first reactions against its use (Kountouri, 2008; Pavlou, 2001). As Pavlou (2001, p. 139) points out,

[t]he expression *ξένοι μετανάστες* “foreign migrants” instead of *λαθρομετανάστες* “illegal migrants” appeared in the summer of 1998, initially on public mass media, as an attempt to control the hysteria that had developed during the previous months, and in view of a rationalizing attitude on the part of [state] administration but also of the Journalist’s Union of Athens Daily Newspapers towards migrants.

As years go by, the stigmatization of the term becomes more frequent, initially among academics and pro-migration activist groups.

In this effort, and in a study conducted for the Hellenic Foundation for the European and Foreign Policy about Greek migration policy, Triandafyllidou (2005, p. 10) stresses her opposition to the term *παράνομος μετανάστης* “unlawful migrant”, which she replaces with the term *παράτυπος μετανάστης* “irregular migrant”, thus pointing out that “the only offense committed [by migrants] is the violation of the law concerning migration since they do not have the necessary documents for entering and residing in the country”. In other words, the act of entering a country without documents is in fact illegal, although referring to an individual as “illegal” is inaccurate: committing a criminal offense does not make you an “illegal” person. This is the main argument used to highlight the inappropriateness of the term *λαθρομετανάστης* “illegal migrant” in the years to come.

3 Needless to say, linguistic expressions and terminology linking migrants to criminality have been employed in other linguocultural communities (see among others Mehan, 1997; Nelson & Davis-Wiley, 2018; Paspalanova, 2008; Pearson, 2010). Due to space limitations, however, we will not elaborate on the comparison between different languages and cultures in this paper.

The most organized attempt to eliminate the use of the term λαθρομετανάστης “illegal migrant” in institutional texts and mass media comes in the form of corrective guidelines by international organizations. Already since 1975, the United Nations General Assembly urged the organs of the United Nations (UN, 1975) and the specialized agencies to use the term *non-documented migrant* or the term *irregular migrant workers* in every official document. This is one of the oldest corrective guidelines we could find concerning the most appropriate ways for referring to migrant populations, and which is obviously ignored in Greece in the 1990s, when the term λαθρομετανάστης “illegal migrant” becomes mainstream. The stricter guidelines concerning the inappropriateness of the terms that connect migration with criminality come to Greece much later, namely in late 2000s and early 2010s.

In a resolution, the European Parliament (2009, article 159) “calls on the EU institutions and Member States to avoid the term ‘illegal immigrants’, which has extremely negative connotations, and instead to refer to ‘irregular / undocumented workers / migrants’.”

The issue also concerns major international press agencies. In 2013, the Associated Press announced that they abandon the use of the term *illegal immigrant*, and any correlation of the adjective *illegal* as a defining characteristic of a person is deleted from the instruction manual (*AP Stylebook*)⁴ and is only kept as a modifier of actions (Colford, 2013). Instead, expressions such *living in / entering a country illegally* or *without legal permission* are chosen.

Such interventions began to make their way into Greek public discourse, when the Commissioner for Human Rights Nils Muižnieks (2014, p.1) in his letter to the then Greek Minister of Maritime Affairs, Miltiadis Varvitsiotis, makes suggestions as for the use of the term λαθρομετανάστης “illegal migrant”, since

[t]he choice of language is very important and the term “illegal migrant”, widely used in European countries, including Greece, associates migrants with illegal acts under the criminal law. I am very much in favor of using the term “irregular migrant”, and “irregular migration”, given that this is more neutral and does not carry the stigmatization of the term “illegal”. It is also the term increasingly favored by international organizations.

Such corrective practices against the use of the term λαθρομετανάστης “illegal migrant” are attempted with a direction from meta-language to language: “A speaker should neither write nor say X but s / he has to say Y because Z” (Moschonas, 2020, p. 210). More specifically, X is the term λαθρομετανάστης “illegal migrant” (or the term παράνομος μετανάστης “unlawful migrant”), Y is the term παράτυπος μετανάστης “irregular migrant”, and Z is the strong stigmatization of migrant populations, as it is evaluated in the context of humanitarian discourse.

The above extracts of corrective guidelines divulge a common attitude concerning the politically correct terms proposed to replace the term λαθρομετανάστης “illegal migrant”. What is stressed through such corrective practices is that, as migration may take place outside a legal framework, discourse should not identify migrants with delinquents and criminals. The adjective παράτυπος “irregular” is used as a lexical bulwark against the criminalization of migrants: thus, they are not considered to be illegal, but not legalized either. At the micro-level, the corrective guideline, which stems from pro-migrant, humanitarian discourses, reacts against the use of the term λαθρομετανάστης “illegal migrant”, which is related to national-xenophobic discourses promoting the connection between migrants and criminals.

4 *AP Stylebook* is a style guide used by newspapers and the news industry in the USA and updated on an annual basis by the editors of the Associated Press.

5 Exploring the term λαθρομετανάστης “illegal migrant” in Greek parliamentary debates

In the broader context of a particularly deep economic crisis since 2009, Greece also found itself in the epicenter of the migration crisis in 2015, when Europe received an exceptionally large number of migrants. Hosting migrants was considered a major challenge for a society already in disorder because of the imposed austerity policies.

As discussed in section 4.3, the national-xenophobic discourse, which perceives migrants as a threat, promoted the use of the term λαθρομετανάστης “illegal migrant”, whereas the humanitarian discourse in favor of migrants was built around the corrective guideline for avoiding the use of this term. This conflict of discourses was refueled in the mid-2010s through new conflicts at the micro-level of language use concerning the appropriate way to refer not only to migrant populations currently arriving in Greece (mostly from Muslim countries), but also to already established migrant populations (e. g., Albanians).

For exploring the use of the term in question in 2015, there are two basic parameters we should consider. First, in the 1990s, the term mainly referred to migrants entering Greece from the Balkans (mainly from Albania). However, in 2015, the demographic characteristics of the arriving migrants are entirely different: Migrants mostly come from Muslim countries. Secondly, Greece has undergone a severe financial crisis, which started in 2009 and during which the standard of living of the Greek people was shattered, especially in the middle and lower classes.

For investigating how the term was used in 2015, we compiled a corpus consisting of Hellenic Parliament Proceedings, since a) they document how Greek parliamentarians employ the term in public, b) such data provide solid evidence concerning the ideological-political identity of those who use each term, and c) they can be easily structured as a searchable electronic corpus.

More specifically, our corpus includes proceedings from 49 plenary sessions in which the term λαθρομετανάστης “illegal migrant” appears. The time range is between January 1, 2015 and December 31, 2015. During this period, two national elections took place. In the first election in January, seven parties entered the Parliament, whereas in the second one in September, one more party was added to those seven.

As expected, the Greek Parliament was the institutional arena *par excellence* for debates related to the migration crisis Greece had to tackle. At the macro-level, the opposing discourses concerning the most suitable management policy for the migration issue framed the discussion at the micro-level about the most appropriate way to refer to migrants. That is, the conflict involved the tension between the corrective guideline for avoiding the term λαθρομετανάστης “illegal migrant”, on the one hand, and the reaction against the corrective guideline and the assertion of the right to use the same term, on the other.

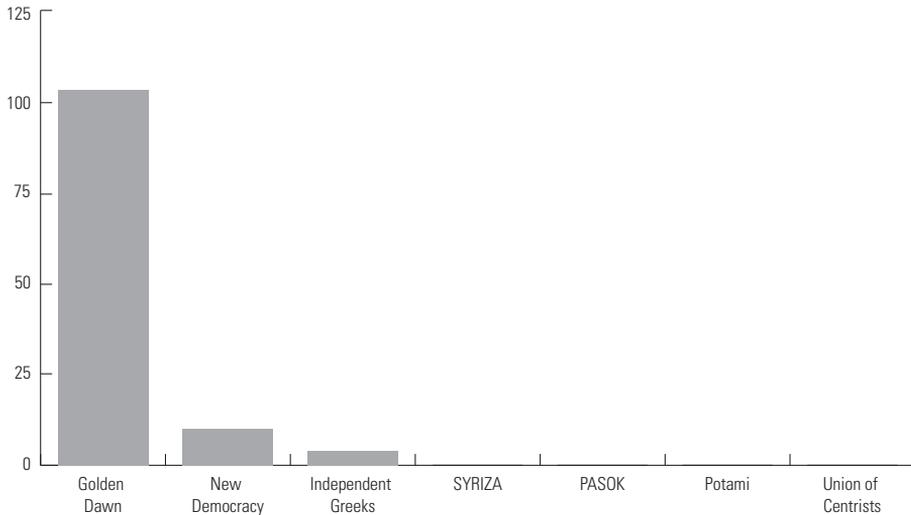
The ruling party elected in both electoral processes (i. e., end of January and mid-September 2015) was SYRIZA, a party of the Left, with pro-migrant and anti-austerity rhetoric. The major opposition party was New Democracy, namely the traditional conservative party of the bourgeois. In the third position was the neo-Nazi party of Golden Dawn with an extreme nationalist and antiracist rhetoric. Less parliamentary power was possessed by the socialist party PASOK, the communist party KKE, the liberal-reform party POTAMI, the party of the populist Right Independent Greeks, and the centrist-populist party Union of Centrists.

5.1 Quantitative analysis of the data

In the plenary sessions examined, the term λαθρομετανάστης “illegal migrant” is attested 118 times. If we classify these tokens according to the party to which the parliamentarians who used them belong, we get Figure 1.

Figure 1 shows that the use of the term has specific ideological-political characteristics, if we consider the political parties whose parliamentarians use it. The

Figure 1: Uses of the term λαθρομετανάστης “illegal migrant” per political party in plenary sessions (n = 118)



term was used by Golden Dawn (103 tokens), New Democracy (10 tokens), and by Independent Greeks (4 tokens). It was also used once by an independent parliamentarian who originated in Independent Greeks. It appears that the term is used exclusively by right-wing parties, mainly by the neo-Nazi Golden Dawn in the context of its extreme anti-migrant rhetoric, while most parliamentarians comply with the corrective directive and consistently avoid the term. Such behavior constitutes a significant difference from the generalized use of the term during the 1990s. In other words, from comparing the above findings with those of studies on its use in the 1990s (see section 4), it could be suggested that the term continues being used despite the corrective guidelines. Its use, however, is not widespread but correlates with specific political views.

5.2 Qualitative analysis of the data: Parliamentarians' reactions against the corrective directive

The data under scrutiny show that those Greek parliamentarians who use the term λαθρομετανάστης “illegal migrant” seem to be aware of the fact that the term was by then ideologically stigmatized and di-

rectly related with one of the two opposing discourses concerning the migration crisis, namely the national-xenophobic discourse, which perceives migrants as a threat, aiming at their exclusion. It is particularly important and indicative of the ideological stigmatization of the term that, in our data, those parliamentarians who use it feel at the same time the need to defend their choice and simultaneously to avoid the stigma of being characterized as racists.⁵

For example, Golden Dawn parliamentarian Christos Pappas defends the use of the term λαθρομετανάστης “illegal migrant” in the plenary session of July 20, 2015. In his question to the then Minister of Interior and Administrative Reform, he talks about an ασύμμετρη απειλή λόγω της αθρόας εισβολής λαθρομεταναστών “asymmetric threat due to the massive invasion

⁵ The data analyzed here could also be explored through an argumentative perspective (e.g., Reisigl & Wodak, 2001; van Eemeren & Grootendorst, 2004). However, such a perspective lies beyond the goals of the present study (i.e., tracing the semantic trajectory of the Greek term λαθρομετανάστης “illegal migrant”).

of illegal migrants.”⁶ In his talk, he refers to the use of the term in question:

Υπάρχει μία τακτική από όλους να πετάτε την μπάλα στην εξέδρα και να κρύβετε πίσω από το δάχτυλό σας την ουσία του πράγματος, εμμένοντας σε μία θέση περί της λέξεως “λαθρομετανάστης”. Ανατρέξτε [...] στο τελευταίο λεξικό του καθηγητού κ. Μπαμπινιώτη. Στα παράγωγα της λέξης “λαθραίος”, “λαθρο” έχει και τη λέξη “λαθρομετανάστης”. Ας κατηγορήσουμε και τον κ. Μπαμπινιώτη ως φασίστα. (Συνεδρίαση ΟΖ', 20.07.2015)

There is a strategy used by all [of you] to pretend not to know anything about the issue and to hide your head in the sand when it comes to the essence of the issue, insisting on a position concerning the word “λαθρομετανάστης” [illegal migrant]. Look it up [...] in the most recent dictionary by Professor Babiniotis. Among the derivatives of the word “λαθραίος”, “λαθρο” [illegal, unlawful, latent, concealed] there is also the word “λαθρομετανάστης” [illegal migrant]. Let us blame Mr. Babiniotis as well for being a fascist. (Session LXXVII, July 20, 2015)

In this extract, an argument is formed in response to the corrective guideline. Christos Pappas defends the use of the term *λαθρομετανάστης* “illegal migrant”, while at the same time stressing the fact that he himself is a minority in the parliament as for this issue (*there is a strategy used by all [of you]*). The reaction against the corrective guideline is a reaction against its justification (i. e., that the term carries racist meaning), as Pappas claims that the term is not racist. He specifically refers to the entry of the prestigious dictionary by Professor of Linguistics Georgios Babiniotis (see Babiniotis, 1998) to sound more convincing. The parliamentarian resorts to an *argumentum ad verecundiam*:

[t]his fallacy consists of backing one’s own standpoint by means of reference to authorities considered to be or passed off as being competent, superior, sacrosanct, unimpeach-

able and so on. The appeal to an authority is always fallacious if the respective authority is not competent or qualified, if she or he is prejudiced or if she or he is quoted inaccurately (Reisigl & Wodak, 2001, p. 72).

Through such an argument, the parliamentarian refrains from commenting on the appropriateness of the term or its racist meaning. Instead, he concentrates on the existence of an entry in a prestigious dictionary implying that all words included in dictionaries are inoffensive, that all such words should be defended as appropriate, or even that the dictionary editor would have omitted the word from the dictionary if he as an expert thought that the word was racist or if he thought that he would be accused of racism. This could be interpreted as a kind of “misquotation” of the editor’s work.

A similar strategy was followed a few days earlier (July 7, 2015) by Golden Dawn parliamentarian Ilias Kasidiaris, when he also defended the appropriateness of the term, after a comment made by the Chair about its use. Kasidiaris used a different kind of argument. This time, the parliamentarian employs an analogy: “drawing *analogies* between actual events and fictitious ones, often fulfils a persuasive function similar to the invention of unreal scenarios that are designated to function as an ‘illustrative example’ in an argumentation” (Reisigl & Wodak, 2001, p. 109, emphasis in the original). His argument compares other, non-racist Greek words having *λαθρο-* “illegal, unlawful, latent, concealed” as a first component (i. e., the real event) with the word *λαθρομετανάστης* “illegal migrant” to claim that the latter is not racist either (i. e., the fictional event):

Ασφαλώς και θα χρησιμοποιού τον όρο αυτόν, διότι σέβομαι την ελληνική γλώσσα. Εξήγησα, δε, ότι ο όρος “λαθρομετανάστης” δεν έχει περιεχόμενο ρατσιστικό. Όπως λέμε “λαθρέμπορο” αυτόν που εμπορεύεται προϊόντα παράνομα, όπως λέμε “λαθροθήρα” αυτόν που κυνηγά παράνομα, έτσι λέμε “λαθρομετανάστη” αυτόν που εισέρχεται στην χώρα παράνομα. (Συνεδρίαση ΞΘ', 07.07.2015)

6 The Greek data discussed here is translated into English by the authors for the purposes of the present study.

Of course, I will be using this term, because I respect the Greek language. In fact, I explained that the term “λαθρομετανάστης” [illegal migrant] does not have racist content. As we call “λαθρέμπορο” [smuggler] the person who trades products illegally, as we call “λαθροθήρα” [poacher] the person who hunts illegally, we also call “λαθρομετανάστη” [illegal migrant] the person who enters the country illegally. (Session LXIX, July 7, 2015)

In both cases, at the micro-level of the language use, we detect a reaction against the corrective guideline for avoiding the term *λαθρομετανάστης* “illegal migrant”. The etymology of the term and its correlation with other Greek terms that have the adjective *λαθραίος* “illegal, unlawful, latent, concealed” as their first component is employed to support the supposed “natural state” of the Greek language, which seems to be disrupted by the intervention of political correctness, as the latter ideologically stigmatizes a “natural” language use. The “natural state” of the Greek language is defended either through an *argumentum ad verecundiam* or through analogy. The corrective directive is thus presented as unnecessary and unjustified.

A similar dialogue took place in the parliament on October 30, 2015 during parliamentary scrutiny and Question Time, where the then Prime Minister Alexis Tsipras was asked about the arrivals of migrants and the migration policy followed by the government. In his speech, the then Prime Minister accused New Democracy (i.e., the then major opposition party) of having used and still using in its official positions and interventions the term *λαθρομετανάστης* “illegal migrant”. New Democracy parliamentarian Georgios Koumoutsakos took the floor to summarize the arguments put forward by those who continued using the term, even after it had been consistently stigmatized:

Είπατε κάτι για λαθρομετανάστες. Ξέρετε, παίζουμε με τις λέξεις. Στην ελληνική γλώσσα όποιος διαβάζει χωρίς να του επιτρέπεται, λέγεται “λαθραναγνώστης”, όποιος κυνηγάει παρανόμως, λέγεται “λαθροκυνηγός”. Όποιος επιβαίνει σε ένα μέσο παρανόμως λέγεται “λαθρεπιβάτης”.

Δαίμονοποιείτε έναν όρο, ο οποίος πράγματι στην ελληνική, όταν ταυτίζεται με άνθρωπο, μπορεί να δημιουργεί πρόβλημα. Όμως, όταν στηρίζετε την κριτική κατά μιας ολόκληρης πολιτικής -που πάντως ήταν αποτελεσματικότερη από τη δική σας- πάνω σε αυτόν τον όρο, τότε κάνετε λάθος. (Συνεδρίαση ΙΔ', 30.10.2015)

You mentioned something about illegal migrants. You know, we are playing with words. In the Greek language, whoever reads without being allowed to do so is called “λαθραναγνώστης” [illegal reader],⁷ whoever hunts illegally is called “λαθροκυνηγός” [poacher]. The person who is aboard a means of transportation illegally is called “λαθρεπιβάτης” [stowaway]. You are demonizing a term, which indeed, when referring to a person, might create a problem in the Greek language. However, when you build the criticism against a whole policy -which nevertheless was more effective than yours- on this term, then you are wrong. (Session XIV, October 30, 2015)

Once again, the parliamentarian creates an analogy with other Greek compound words to propose that the term *λαθρομετανάστης* “illegal migrant” is a “natural,” not necessarily offensive or racist formation of Modern Greek, while talking about the *demonization* of the term. However, he recognizes some problems in its use (*when referring to a person, might create a problem*). Not only does he react against the corrective guideline itself and its justification, but he also underestimates its importance by talking about *playing with words*.

All three extracts analyzed here attempt to respond to the corrective guideline by using arguments of linguistic formalism disconnecting the national-xenophobic discourse (of the macro-level) from the use of the term *λαθρομετανάστης* “illegal migrant” (at the micro-level). In other words, there is an attempt to denounce the racist conceptualization of

⁷ Λαθραναγνώστης “lit. illegal reader” refers to the person who stands in a kiosk reading newspapers without eventually buying one so as to save money, or s/he sits next to someone else (e.g., in the bus) for the same purpose.

the term and to question its correlation with that discourse, eventually aiming at returning to the generalized use of the previous years.

5.3 Illegal migrants as invaders

In the data examined here, the term λαθρομετανάστης “illegal migrant” appears to co-occur with specific metaphorical representations of migrants. In political communication, metaphors are employed to represent entities and / or events in simple, easy to grasp terms, to reinforce representations already in wide circulation, and to bridge the gap between reason and emotion (see among others Charteris-Black, 2005; Mio, 1997). In this sense, metaphors used to represent migrants cannot be overlooked. In fact, relevant research suggests that specific metaphors are employed and disseminated to refer to the migration “problem” and its “resolution,” which in turn legitimize and support migration policies (see Charteris-Black, 2006; Cunningham-Parmeter, 2001; Musolff, 2015; Quinsaat, 2014). Migrant metaphors may thus function as a “guide for future actions” (Lakoff & Johnson, 1980, p. 156).

More specifically, migrant metaphors tend to (re)produce negative stereotypes against migrants in a dehumanizing framework (Montagut & Moragas-Fernández, 2020). Migrants are metaphorically represented as *natural disasters* (Charteris-Black, 2006), *parasites* (Musolff, 2015), or *water and floods* (Baker & McEnery, 2005). Outside this framework, migrants are also metaphorically represented as (*an army of*) *invaders* and migration as an *invasion* (see among others Cunningham-Parmeter, 2001; El Rafaie, 2001; van Dijk, 2005). It is exactly this invasion metaphor that is often attested in the data examined here.

For example, the General Secretary of Golden Dawn Nikos Michaloliakos metaphorically connects migrant arrivals with the invasion of barbarians into Rome (October 7, 2015). In the plenary session of March 30, 2015, the then Leader of New Democracy Antonis Samaras talks about ορδές λαθρομεταναστών “hordes of illegal migrants” who have conquered the center of Athens. Ilias Panagiotaros of

Golden Dawn refers to an εισβολή χιλιάδων λαθρομεταναστών “invasion of thousands of illegal migrants” (December 1, 2015). Another Golden Dawn parliamentarian, Christos Pappas, posed a question about the αθρόα εισβολή λαθρομεταναστών “massive invasion of illegal migrants” (June 23, 2015 and July 20, 2017). The General Secretary of Golden Dawn Nikos Michaloliakos once again talks about an εισβολή “invasion” (August 14, 2015), whereas Georgios Germenis, also a Golden Dawn parliamentarian, uses the neologism λαθροεισβολείς “illegal invaders” (October 6, 2015) and Christos Pappas talks about λαθροεισβολή “illegal invasion” (July 20, 2015). It is interesting to note here that the first compound λαθρο- “illegal, unlawful, latent, concealed” is again used to create these new terms, thus underlining the connection / identification between λαθρομετανάστες “illegal migrants” and λαθροεισβολείς “illegal invaders.”

Through this metaphorical conceptualization, speakers promote the *threat/exclusion* discourse: migrants are “threatening invaders” who must be excluded from the country. Such conceptualization becomes the ideological basis for policies aimed to prevent this “invasion” and eventually to legitimize stricter border controls. At the same time, it undermines the *moral obligation/solidarity* discourse by implying that the host country and its people are invasion victims who need to fight back (and not show any solidarity to) migrants. It could therefore be suggested that, by representing migrants as both illegal / criminals and invaders, parliamentarians highlight the “precarious” situation the country is in, and the emergency its people have to deal with.

Moreover, the perception of the migration crisis as a threatening invasion is further stressed through constant references to the number of migrants arriving to Greece. The quantification of migrants is often used by Golden Dawn parliamentarians in references such as χιλιάδες “thousands” (Nikos Kouzilos, December 9, 2015) and εκατοντάδες χιλιάδες “hundreds of thousands” (Ilias Panagiotaros, June 24, 2015). This insistence on defin-

ing the number of migrants overshadows migrants' tragic experiences, on the basis of which the humanitarian discourse of solidarity and moral obligation towards them is constructed (see also KhosraviNik, Krzyzanowski & Wodak, 2012, pp. 289–293; Reisigl & Wodak, 2001, p. 79).

In sum, through the co-occurrence of the term λαθρομετανάστης “illegal migrant” with invasion metaphors and quantifications involving large numbers, migrants are projected as a serious threat to the Greek state and the national security. Such discursive choices at the micro-level obviously reinforce a representation that is particularly compatible with the national-xenophobic discourse, which perceives migrants' entrance in the country as a threatening invasion and aims at their exclusion.

6 Conclusions

In this study, we attempted to analyze aspects of the opposing discourses about the migration issue in Greece before and during the migration crisis of 2015, as they can be detected through the use of the term λαθρομετανάστης “illegal migrant” but also through public discussions about its appropriateness. To this end, we followed a CDA approach, utilizing mainly its position concerning the dialectic relationship between the macro-level and the micro-level. By using this dialectic relationship in our analysis, we attempted to trace the semantic trajectory of the term λαθρομετανάστης “illegal migrant” from early 1990s until mid-2010s.

We claimed that, when in 2015 Greece found itself in the epicenter of the migration crisis, at least two main and opposing discourses emerged concerning its management: the *moral obligation/solidarity* discourse put forward to defend migrant rights versus the *threat/exclusion* one aiming at migrants' stigmatization and marginalization. It is exactly in this context that we examined the uses of the term λαθρομετανάστης “illegal migrant” as well as the sociopolitical circumstances that generated them.

In the beginning, we followed the semantic trajectory of the term based on already existing research. We observed that during the 1990s the term had become a means for connecting migration with criminality and, by extension, migrants with criminals. Consequently, the term λαθρομετανάστης “illegal migrant” was used back then as part of a hegemonic national-xenophobic discourse at the expense of migrants who were in the Greek territory (mainly Albanians). Such racist uses of the term began to be detected and highlighted early on. At the same time, and objecting to such uses, an alternative pro-migrant discourse started to emerge at the macro-level. Political correctness played a significant role in the persistent debates about the appropriateness of the term and, eventually, its stigmatization in Greek.

In the present study, political correctness was deemed as a type of corrective practice, as it detects naturalized language uses that reproduce stereotypes and power relationships. Then, it intervenes at the micro-level by attempting their ideological stigmatization and replacement, and by suggesting new terms, which do not seem to reproduce stereotypes and power relationships. Such an intervention is not limited to individual language use at the micro-level: It is always performed in relation to the macro-level of discourses. After all, political correctness aims at the rupture with, or the subversion of, hegemonic discourses lurking behind the terms it stigmatizes.

As for the Greek term λαθρομετανάστης “illegal migrant,” the corrective guideline suggested the following:

The term λαθρομετανάστης “illegal migrant” should be replaced by the term παράτυπος μετανάστης “irregular migrant”, because the first one represents migrant populations in a negative manner.

The politically correct term is chosen mainly to replace the term λαθρομετανάστης “illegal migrant” and to underline the stereotypical, racist connection between migration and criminality. Gradually, the corrective guideline becomes more in-

tense and institutional. As a result, the term indeed lost the seeming evaluative neutrality it had in the 1990s. By 2015, the term λαθρομετανάστης “illegal migrant” was already stigmatized as racist and did not appear to exhibit the pervasive hegemonic use it had back in the 1990s.

Moreover, we demonstrated that, despite the corrective practice of political correctness, the term continues to be used inside the Hellenic Parliament in 2015. This time, however, it is not naturalized and does not constitute the linguistic means of a hegemonic and, in fact, unquestionable national-xenophobic discourse. Those who use it inside the Hellenic Parliament often feel the need to defend their choice against the corrective guideline, which nonetheless continued being repeated during parliamentary debates. Thus, the term is not used as a “neutral” one but as a marked option in reaction against the corrective guideline.

At the same time, the analysis of our data shows that the correlation of the term λαθρομετανάστης “illegal migrant” with the national-xenophobic discourse and, more specifically, with perceiving migrants as a national threat is maintained, if not reinforced. This is attested in the discourse of right-wing and extreme right-wing parties in the Hellenic Parliament. Despite the corrective directive, the use of the term served to identify migrants with invaders through invasion metaphors. It is not a coincidence that we find the term in question to be modified by numerical adjectives, which stress the number of people belonging to these populations and, at the same time, downplay the significance of migrant experiences, which form the basis of the humanitarian discourse and the discourse of moral obligation and solidarity towards them.

Finally, it could be suggested that the semantic trajectory of the Greek term in question can be traced as follows: *Racist identification of λαθρομετανάστες “illegal migrants” with criminals* > *Stigmatization of the term in question via corrective directives in the framework of political correctness* > *Racist recontextualization of the term as “invaders”*.

The semantic trajectory of the term λαθρομετανάστης “illegal migrant” allows us to trace how language use at the micro-level is dialectically connected with discourses at the macro-level. In particular, the term λαθρομετανάστης “illegal migrant” has been widely used since the 1990s, and later on as a reaction against a corrective practice. It was in particular used as part of a discourse perceiving migrants as a threat and, thus, functioned as a way to legitimize their political exclusion. Therefore, the term and its recontextualization, i. e., illegal migrant as invader, serve as an indication of the dialectical correlation between language use and opposing discourses: the *moral obligation/solidarity* discourse and the *threat/exclusion* one.

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Conflict of interest

The authors declare no conflict of interests.

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The “refugee crisis” as an opportunity structure for right-wing populist social movements: The case of PEGIDA

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Abstract

Current research on right-wing populist communication is often confined to political parties, with social movements receiving much less attention. To help fill this research gap, we examine the frames and master frames of the PEGIDA movement and the role of the 2015 “refugee crisis” in shaping them. Using qualitative content analysis of speeches held at PEGIDA rallies between 2014 and 2016, we identify two distinct master frames, each consisting of five particular frames. Besides an initial master frame about the allegedly looming *Islamization of Europe*, a second master frame dealing with the *Perils of Asylum* emerge during the “crisis” – ultimately, both converge, with the latter incorporating central elements of the former. These findings buttress our interpretation of the “crisis” as an opportunity structure that helped right-wing populist social movements to revitalize their message and broaden their audience. However, its long-term impact still appears limited as PEGIDA’s influence has greatly waned in recent years.

Keywords

PEGIDA, framing, refugee crisis, social movements, content analysis, right-wing populism, Islam

1 Introduction

Over the past decade, the rise of right-wing populism, its challenge to representative democracy, and its impact on liberal politics has been frequently discussed among both social scientists and political practitioners (e.g., Bonikowski, Halikiopoulou, Kaufmann, & Rooduijn, 2019; Norris & Inglehart, 2019; Wodak, KhosraviNik, & Mral, 2013). This is all the more true for Germany, where heated discussions about minorities (e.g., after the release of Thilo Sarrazin’s Islamophobic bestseller *Deutschland schafft sich ab* [*Germany abolishes itself*]), the political fallout of Europe’s sovereign debt crisis, and the unmasking of the neo-Nazi terrorist group *Nationalsozialistischer Untergrund* [*National Socialist Underground*] had ushered in an era of growing discontent and polarization. In only a couple of years, the country witnessed the rise of its most successful far-right party

in over seven decades (i. e., the *Alternative für Deutschland* [*Alternative for Germany*], *AfD*), the popularization of right-wing populist and conspiracist media platforms (e.g., *PI-News* and *Deutschland-Kurier*), and the birth of a new social movement: PEGIDA (*Patriotische Europäer gegen die Islamisierung des Abendlandes* [*Patriotic Europeans against the Islamization of the Occident*]). Appearing on the political scene in late 2014, this Dresden-based group quickly gained notoriety by staging protest rallies against what its supporters perceived as an accelerated Islamization of country and continent (e.g., Rehberg, Kunz, & Schlinzig, 2016; Vorländer, Herold, & Scheller, 2018). Unsurprisingly, this message proved attractive to many on the right, and it did not take long until similar but less successful movements began to emerge in other German cities – LEGIDA in Leipzig, DÜGIDA in Düsseldorf, and BÄRGIDA in Berlin, to name but a few. In



some countries, most notably the United Kingdom, the PEGIDA label even morphed into an eclectic “rallying point appropriated by pre-established radical right activists” (Berntzen & Weisskircher, 2016, p. 56), who were neither connected to the Dresden group nor did they have the recognition of its leadership.

Most initial research on PEGIDA was sociodemographic and sociopsychological in nature, examining its supporters, their motives, attitudes, and group characteristics (e.g., Daphi et al., 2015; Patzelt & Klose, 2016; Vorländer et al., 2018). In contrast, a comprehensive exploration of the content of PEGIDA’s messages was (and still is) rather limited. As is scholarship on the communication of populist actors, which gives considerably more attention to political parties (e.g., Ernst, Engesser, Büchel, Blassnig, & Esser, 2017; Hatakka, Niemi, & Välimäki, 2017; Kalsnes, 2019) than to social movements (but see e.g., Guenther, Ruhmann, Bischoff, Penzel, & Weber, 2020; Nissen, 2020). Based on a qualitative content analysis, this article contributes to overcoming these limitations. Inquiring into PEGIDA’s framing and the impact of the 2015 “refugee crisis,”¹ it presents new insights into the communication strategies of right-wing populist social movements in times of increased political contestation.

2 Theoretical foundations

Due to its demands, PEGIDA is typically classified as such a movement and thus as belonging to the rapidly expanding field of *populism studies*. Populism, despite having been theorized intensively in recent years, is still a vague concept with a diverse range of possible meanings. According to Gidron and Bonikowski (2013), it can be

inter alia understood as ideational (e.g., Mudde, 2004; Mudde & Rovira Kaltwasser, 2012; Stanley, 2008), performative (e.g., Jagers & Walgrave, 2007; Moffitt, 2016), or strategic (e.g., Barr, 2009; Weyland, 2001). Although these paradigms entail different methodological implications, they are not necessarily exclusive; rather, their integration into a joint concept of *populist political communication* has been proposed (Aalberg & de Vreese, 2017).

Populist communication has been associated with a certain set of stylistic features, most prominently with simplification, dramatization, emotionalization, and invocations of common sense (Mazzoleni, Stewart, & Horsfield, 2003; Mudde, 2007; Rooduijn, 2014). While the populist message seeks to elicit strong feelings, such as enthusiasm and anger, much of its content involves three distinct elements: (1) people-centrism, (2) anti-elitism, and (3) the identification of an out-group (Aalberg & de Vreese, 2017; Jagers & Walgrave, 2007; Kriesi, 2014). People-centrism emphasizes popular sovereignty and unity, while anti-elitism evokes notions of a selfish elite that has become estranged from the people and is therefore incapable of comprehending its true will. Last, to identify an out-group means to designate a collective minoritarian “Other” that, in the populist’s imagination, is the direct or indirect beneficiary of the people’s misfortune.

Some have argued that these three elements fit the logic of modern mass media and provide populist actors with the “oxygen of publicity” (Aalberg & de Vreese, 2017, p. 4) that enables them to spread their message and exercise discursive influence (e.g., Mazzoleni, 2014; Vorländer et al., 2018). These actors can be individual politicians, political parties, and governments but also social movements, which can be defined as *heterogeneous networks striving for social or political change (or attempting to resist such change) through orchestrated collective action* (Rucht & Neidhardt, 2001). Because they are conscious of the fact that competing for a resource as scarce as public attention requires enduring popular support, social movements

1 “Refugee crisis” is potentially misleading because it may be understood as a crisis caused by those fleeing war and persecution, and not by those who are responsible for their plight or failed to provide them with adequate support. Distancing ourselves from this reading of the term, we place it in double quotation marks throughout this article.

often seek to generate a sense of group identity and ethos (McAdam, McCarthy, & Zald, 1996). A handy tool to reach this goal is the use of social media platforms; Facebook, Twitter, YouTube, and, more recently, TikTok are the most relevant examples in this regard (e. g., Ernst, Esser, Blassnig, & Engesser, 2019; Priante, Ehrenhard, van den Broek, & Need, 2018). These platforms allow social movements to gain direct access to dispersed and disproportionately young audiences while bypassing traditional information gatekeepers (e. g., Gaby & Caren, 2012; Haller & Holt, 2019; Stier, Posch, Bleier, & Strohmaier, 2017). As a consequence, many youth-oriented right-wing movements put their focus on connective rather than collective action (Bennett & Segerberg, 2012) and emphasize the role of digital communication (Bogert & Fielitz, 2019; Guenther et al., 2020). PEGIDA differs from them insofar as its online activities are less elaborate in style and excessive in scope. Even though Facebook used to be of relevance during the movement's early phase, its main purpose was to address an already sympathetic audience.

To better understand PEGIDA's communication strategy, we studied its *frames*, which is an established approach in research on collective identities and action (e. g., Benford & Snow, 2000; Snow, Vliegthart, & Ketelaars, 2019). In the social movement context, frames can be defined as bundles of "conscious strategic efforts by groups of people to fashion shared understandings [...] that legitimate and motivate collective action" (McAdam et al., 1996, p. 6) by highlighting selected aspects of an issue and aligning them with key movement demands (Entman, 1993). However, since social movements are, by nature, heterogeneous, they may not rely on such *particular frames* alone but attempt to create overarching *master frames* that link their goals to an idealized "Us" (Benford & Snow, 2000). This strategy is popular among other populist actors as well: As Rooyackers and Verkuyten (2012) noted in the case of Geert Wilders and his *Partij voor de Vrijheid*, efforts to reframe the public's collective identity and present

one's own beliefs as prototypical are essential instruments in the populist toolbox.

Periods of crisis and uncertainty provide highly attractive *opportunity structures* to foster the creation of master frames. Whenever a crisis arises, it usually entails the disintegration of norms and beliefs that have long been taken for granted in society (Rosenthal, t'Hart, & Charles, 1989; see also Bitschnau, Ader, Ruedin, & D'Amato, 2021), which encourages many people to raise their voices and engage in collective action. While this action is often rooted in the ramifications of the crisis on their lives, one must not forget that crises are always subject to social construction and interpretation. Their cause, outcome, magnitude, and teleological dimension are primarily a matter of perception, and depend to a far greater extent on hopes, fears, or ideological predispositions than on factual evidence (Seeger & Sellnow, 2016; Walby, 2015). Just like other political actors, social movements may attempt to seize the moment and exploit what is perceived as crisis for their own gain: for example, to mobilize supporters and put pressure on the government (della Porta & Mattoni, 2014; Gamson & Meyer, 1996) or, in the case of populist social movements, to assign responsibility to elites (Mudde, 2004) while casting themselves as advocates of those who unjustly carry the burden of the crisis.

A look into recent history gives us a more comprehensive understanding of how important crises can be to the success of social movements. One particularly noteworthy example is the catastrophe of Chernobyl in 1986, which not only helped anti-nuclear movements garner mainstream attention (Koopmans & Duyvendank, 1995) but also paved the way for the anti-nuclear politics of the present. Not as lasting (but nonetheless impactful) was the rise of *Occupy Wall Street* and similar anti-austerity movements in the wake of the economic, financial, currency, and debt crises of the 2000s and 2010s (e. g., della Porta, 2012; 2015; Gerbaudo, 2017; Langman, 2013). Even more recently, a wave of pro-environmental movements, particularly *Fridays for Future* and *Extinc-*

tion Rebellion, has swept across Europe. Headed by media-savvy activists, they established themselves as relevant stakeholders in a short period of time and have been responsible for numerous policy advances since (e.g., in Germany, their activism and pressure helped pass the 2019 *Climate Action Law*).

But while the aforementioned movements have been progressive in character and concerned with articulating demands from a distinctively countercultural position, others appeal to more right-leaning audiences; in the case of PEGIDA, to an audience agitated by an event commonly referred to as the “European refugee crisis” (e.g., Lichtenstein, Ritter, & Fähnrich, 2017; Vorländer et al., 2018) and its aftermath.² During this humanitarian “crisis”, several hundred thousand refugees applied for asylum in Europe within only a few months, with the question of their admission and treatment soon turning into a source of perpetual controversy. Even in Germany, the European country most affected by their arrival, the initially warm and welcoming attitude of the public evaporated with time and gave way to increasing skepticism (see Lichtenstein, 2021).³ Calls to close borders and tighten asylum policies became common by late 2015, with a notable effect on PEGIDA’s discursive relevance. After having been weakened by scandals and unfavorable press coverage in the months prior, the movement once again attracted a great many *Spaziergänger [walkers]* to its rallies (Kemper, 2015).⁴ Against this background,

we examine the role of the “crisis” in PEGIDA’s framing by asking:

- 1) Which (master) frames can be found during the “refugee crisis”?
- 2) How do these (master) frames relate to each other against the “crisis” background?

3 Methodology

To provide answers to these questions, we analyzed 63 speeches given by 27 speakers at 14 PEGIDA rallies between 2014 and 2016, which we had retrieved from a PEGIDA-affiliated YouTube channel. By uploading and sharing videos of its rallies, PEGIDA deviates from the sophisticated audience targeting strategies of other right-wing populist actors (e.g., Ernst et al., 2019; Guenther et al., 2020; Maly, 2019), which makes it possible to access its speech contents and frames more directly.

Our analysis covers a period that encompasses both PEGIDA’s formative stage and the first year of the “crisis.” We selected four different series of rallies (i.e., December 2014 to January 2015; July to September 2015; January 2016; June to August 2016) to ensure their balanced distribution over the whole examination period. Each series comprises between two and five recorded rallies, with three to six speeches per rally (not counting announcements and interruptions) and a rally duration ranging from 33 to 141 minutes (93 minutes on average). As a matter of principle, we covered these rallies in their entirety; they usually began with organizational remarks and contained extensive footage of the protest walks. We selected more rallies from the two summer periods because these took place on a bi-weekly rather than weekly basis. As a result, they were longer, less repetitive, and more diverse in terms of content.

2 Chryssochoou (2018) has shown that those who express support for far-right positions in times of crisis are often not *challenging* the system but *disaffected* by it. They are “betrayed believers” in search of a new identity that is offered by movements like PEGIDA.

3 This was particularly the case after the 2015–2016 New Year’s Eve assaults in Cologne. Stereotypes about the violent and sexually frustrated Arab “Other” (e.g., Boulila & Carri, 2017; Weber, 2016) dominated the media coverage, and xenophobic incidents became more frequent.

4 In December 2014 and January 2015, PEGIDA regularly mobilized between 15000 and 25000 protesters but lost most of this sup-

port over the following months. Due to the heightened salience of the “refugee crisis”, these numbers bounced back to around 20000 by October 2015.

We first noted the names and number of speakers, length and number of speeches, guest speakers' affiliations, and speech interruptions. Only four out of 27 speakers were members of PEGIDA's core team (i. e., Lutz Bachmann, Siegfried Däbritz, Tatjana Festerling, and Kathrin Oertel), with most being guests (18) or representatives from other GIDAs (5), such as the nearby Leipzig and Chemnitz branches. We then started our analysis by extracting statements (defined as coherent and content-related language segments) from speech transcripts that either referred to the "crisis" or evoked related allusions to an external threat (N=418).

These statements constituted our data and were coded via the frame elements of problem description, problem cause, problem attribution, and problem intervention proposed by Entman (1993) and later refined by Jecker (2014). We included only statements that contained two or more elements and developed our categories and subcategories inductively. The coding itself was conducted by two of the authors who participated in intensive training to ensure consistently high reliability. Both worked independently from each other but met regularly to compare their results and discuss borderline cases. Following Mayring's (2014) structuring approach, the statements were then condensed and systemized over several iterative steps until the particular frames could be grouped into holistic master frames.

4 Findings

Regarding the first question, we find two different master frames that convey PEGIDA's central reference points. The first, *Fears of Islamization*, relates to the movement's initial message; it contains expressions of cultural anxiety and attempts to establish a dichotomy between a European in-group and a Muslim out-group. The second, *Perils of Asylum*, emerges during the first months of the "crisis" but soon becomes a similarly prominent leitmotif. It denounces asylum seekers from Africa and the Middle East by portraying them as

particularly visible embodiments of "crisis"-related disruption and danger.

4.1 Fears of Islamization

The *Fears of Islamization* master frame consists of five particular frames: *Cultural Inferiority*, *Historical Antagonism*, *Unwillingness to Integrate*, *Dangers of Infiltration*, and *Terrorism and Violence*. Each represents another facet of how the Islamic threat is imagined. In *Cultural Inferiority*, Islam is described as primitive and incompatible with European values and civilization. This line of thought is supplemented by culturalist claims that in Islamic societies, women "possess no worth" (Bachmann, speech held on August 1, 2016), LGBTQ individuals get hanged, and non-believers are subject to humiliating treatment. By associating Islam with bigotry and showing superficial solidarity with those suffering from religious extremism, this frame follows the increasingly popular right-wing populist strategy of cloaking Islamophobia in a more acceptable civilizationist jargon (Brubaker, 2017). The distinction between the in-group and the out-group is first discursively established and then linked to competing concept pairs, such as superior / inferior, civilized / savage, and progressive / regressive.

The second frame, *Historical Antagonism*, eternalizes this hierarchy by interpreting the antagonism between Christianity, secularism, humanism (the Occident: tolerance and rationality), and Islam (the Orient: relapse into barbarism and superstition) as embedded in a centuries-old conflict between reason and fanaticism. Whenever both worldviews meet, so the argument goes, they will inevitably clash since Islam's lust for power prevents peaceful co-existence. This conception is reinforced by allusions to, and civilizationist reinterpretations of, past conflicts between Christian and Islamic powers. Violent encounters like the Battle of Tours in 732 AD, where Frankish knights halted the advance of Umayyad raiders, are in this sense interpreted as direct precur-

sors to the fight that PEGIDA claims to be forced to wage today.⁵

The next two frames, *Unwillingness to Integrate* and *Dangers of Infiltration*, provide contradictory accounts of Islamic life in Europe. The former consists of complaints about the refusal of Muslims to peacefully integrate into European societies. After mid-2015, it gradually evolves into the deterministic conviction that all integration efforts are futile because “these people will never betray their culture” (Bachmann, speech held on August 1, 2016). This pessimistic angle is often accompanied by the notion that Muslim archaisms have been imported to Germany en masse, putting natives in serious danger. Prominently referenced are “honor killings, sharia law, clan leaders, Arab street gangs, head kicking, cartoon controversies, burqas, halal slaughtering [...]” (Festerling, speech held on September 7, 2015), and other cultural practices deemed disturbing, strange, or harmful.

By stark contrast, *Dangers of Infiltration* postulates that many Muslims have created the impression of successful integration but only to infiltrate political parties, media channels, schools, and other key institutions and prepare them for an Islamic takeover. Here, Muslims are imagined as natural-born schemers, always waiting for an opportunity to trick naïve “infidels” into believing that they adhere to the tenets of secularism and democracy. And as Germany is “governed by madmen” (Horst, speech held on September 14, 2015)⁶ who fail to acknowledge the obvious, these alleged Islamic moles have permeated even the highest echelons of power. In a misinterpretation of *Taqiyya*,⁷ it is even claimed that Muslims are allowed, if not ordered, to lie and betray as long as

it is in the interest of their religion. While bearing resemblance to popular conspiracy theories, such as Renaud Camus’ *Great Replacement*, this fear of the double-faced Islamic infiltrator follows the much older tradition of suspecting a threatening foreign “fifth column” in one’s country; a pernicious trope that has been used for centuries to justify the persecution of ethnic and religious minorities.

Finally, evoking the memory of terrorist acts in which Muslims were involved, *Terrorism and Violence* insinuates the existence of an Islamic master plan to ravage “the West” by fire and sword. According to this frame, violence is considered a virtue in Islam, rooted in the teaching of Muhammad and legitimized by Qur’anic doctrine. Terrorism comes “from the heart of Islam” (Stürzenberger, speech held on August 1, 2016), and whoever denies this must be “blind or paid off” (Däbritz, speech held on July 18, 2016). Different from the other *Fears of Islamization* frames, Muslims are linked to concrete actions this time, which leads to an infusion of PEGIDA’s culturalist discourse with pre-existing post-9/11 narratives.

4.2 Perils of Asylum

The *Perils of Asylum* master frame also consists of five particular frames: *Asylum Seekers as Economic Burden*, *Asylum Seekers as Security Threat*, *Asylum Seekers as Cultural Danger*, *Asylum Seekers and Political Elites*, and *Asylum Seekers in the Media*. All are varieties of the same sinister theme of political treason and disaster. *Asylum Seekers as Economic Burden* originates in the basic suspicion that “these people cost us a lot of money” (Wagensveld, speech held on December 8, 2014) and are pampered with state-sponsored amenities (e.g., cell phones and designer clothing). This “generosity” is then rejected as undeserved and contrasted with insufficient funding for schools, hospitals, and other public infrastructure projects. “[Chancellor Merkel,] you allow lazy Africans to plunder our welfare system when they should rebuild their own home countries” (Köhler, speech held on July 13, 2015) is a typical complaint in this regard, relativiz-

5 Further references include the Battle of Lepanto (1571), the Siege of Vienna (1683), and the Crusades. The latter are interpreted as defensive enterprises aimed at reclaiming Christian lands that were previously taken by an ever-expanding Islam.

6 This speaker’s last name is unknown.

7 A historical practice in Shia Islam of concealing one’s faith when under threat of persecution or compulsion.

ing the hardships suffered by the “Other” and reproducing colonial narratives of idle Blacks. The populist triad of elite, people, and out-group appears here in particularly graphic terms: The elite betrays the people it has sworn to serve by squandering the fruit of its labor in order to accommodate undeserving out-group members.

This notion of undeservingness is further reinforced in *Asylum Seekers as Security Threat*, which suspects that many radicals have seized the “crisis” as an opportunity to enter Germany in disguise. Naturally, this is a cause of concern, and speakers such as Lutz Bachmann frequently emphasize that “we can only guess how many of these self-declared Syrians are real Syrians, and how many Islamists, terrorists, and Salafists are among them. I don’t even want to think of such a scenario” (Bachmann, speech held on September 7, 2015). In contrast to the *Terrorism and Violence* frame, this threat does not emanate from an ethno-cultural trait but is the byproduct of political naivety to which the solution could not be more straightforward: “End this solidarity nonsense! And then kick all these cutthroats, terrorists, and dirty Islamists out of Europe!” (Stürzenberger, speech held on August 1, 2016).

Less concrete is *Asylum Seekers as Cultural Danger*. This frame pivots on anxieties that the ontological essence of Germanness is jeopardized by asylum-based immigration. The presence of the “Other” is feared for it may change the ethnic face of the nation, threaten the political order, exert demographic pressure, and subvert established norms. Georg Tegetmeyer, a far-right activist affiliated with PEGIDA’s Nuremberg branch (Nügida), even invokes the biblical account of the Tower of Babel to illustrate the experience of utter alienation that stems from the impression of being overrun by alien influences: “We walk through cities that have become foreign to us. Do you remember the story of Babylon? We feel the same right now. Many voices, many languages, and we don’t understand them; we don’t understand anything” (Tegetmeyer, speech held on January 4, 2016). As an antidote, it is suggested

that there should be greater awareness of Germany’s cultural heritage and more respect for majoritarian norms and values.

The remaining frames, *Asylum Seekers and Political Elites* and *Asylum Seekers in the Media*, go in a slightly different direction: They do not focus on the refugees but on those responsible for, and supportive of, liberal asylum policies. High-level German politicians (especially Chancellor Merkel) are accused of “inviting” asylum seekers to either replace the electorate or curry favor with industry bosses looking for a pretext to cut the wages of low-skilled natives. Meanwhile, mainstream journalists are attacked for knowing about this plan but keeping silent. Instead of raising their voices in protest, they rejoice “just as they did in 1914 and 1933!” (Wilfried, speech held on July 13, 2015).⁸ In the end, both frames depict the elite as a treasonous camarilla of immigration profiteers.

4.3 Frame convergence and development

Regarding the second question, our findings address the link between both master frames. Most importantly, we see that their contents converge over time and the differences between *Muslims* and *refugees* become blurred. Refugees are increasingly perceived as Muslims, regardless of their skin color, country of origin, or creed, while Muslims are identified with foreigners and *Schutzsuchende* [protection seekers]. This culturalization of refugees and simultaneous ethnicization of Muslims becomes particularly visible when PEGIDA speakers argue that “we don’t want Muslim refugees [who arrive] holding the Qur’an in their hands, but [we want] persecuted Christians” (Festerling, speech held on July 13, 2015) and that not “one single foreign Muslim should be allowed to enter Europe during the next years. The [...] Islamization and terrorization of the Occident must end!” (Däbritz, speech held on July 18, 2016). By implying that Muslims

⁸ This speaker’s last name is unknown. His statement refers to the uncritical press coverage during the outbreak of World War I (“1914”) and the rise of Adolf Hitler (“1933”).

are by definition non-Europeans, citizens of majoritarian Muslim European countries (e. g., Albania or Kosovo) and converts are *a priori* excluded from the culturally Christian and spiritually secular *Abendland* that PEGIDA envisions.

However, this convergence between both master frames appears less as a merger and more as an absorption, with the evermore dominant *Perils of Asylum* master frame incorporating central elements of the older *Fears of Islamization* master frame. In other words, PEGIDA's opposition to Islam does not vanish against the backdrop of the "crisis" but becomes part of it, contributing to the "crisis" narrative that something dangerous is happening, something that might spell the end of Germany as an ethnically and culturally homogeneous entity.

Aside from these observations, there are several indications that the rhetoric of PEGIDA speakers grows more vulgar and hostile over time. While there were at least occasional expressions of respect for Muslims in late 2014 (under the strict condition of assimilation), later speakers invent insulting terms, such as "*Korandertaler*" (a portmanteau of *Koran* for Qur'an and the Neanderthal species), "*Kassyrer*" (another portmanteau that fuses *kassieren* ["to cash in"] with Syrians), or "*Sprenggläubige*" (["believers in explosions"], a pun on *strenggläubig* [holding strong religious beliefs] which is frequently used to describe pious Muslims). Other derogatory terms include "*Messermänner*" (["knife-men"], alluding to the alleged overrepresentation of Muslims in violent crime), "*Scheinasylanten*" (["sham asylum seekers"], invoking fraud and deception), "*Invasoren*" (["invaders"], equating human mobility with military action), and "*Kulturbereicherer*" (["cultural enrichers"], meant in a sarcastic and scornful way).

This tendency toward rhetorical radicalism is complemented by the desire to be considered the center of political resistance, a desire that can be found in both master frames. At its core is the belief that the situation may look grim but is far from hopeless. Too strong is the German warrior spirit that has defeated the enemies

of freedom and sovereignty in the past, be they "the Romans in the Teutoburg Forest, the Turks at the gates of Vienna, or even the troops of Napoleon at Leipzig [...]; in the end, we will be victorious!" (Sven, speech held on August 10, 2015).⁹ By making such references, PEGIDA poses as a *bona fide* national movement and transcends the local context from which it has originally emerged; by having recourse to events such as the Ottoman siege of Vienna, it also transcends this national context and positions itself as part of a civilizationist project aimed at defending a pan-European identity.¹⁰

5 Discussion

Examining right-wing populist communication from a social movement angle, this article analyzed frames and master frames of PEGIDA in terms of how they relate to the "refugee crisis." Our findings suggest the existence of two distinct master frames that consist of several particular frames. One of them – *Fears of Islamization* – is concerned with PEGIDA's original message, whereas the other – *Perils of Asylum* – addresses the fallout of the "crisis." Both the appearance of *Perils of Asylum* and the observation that it incorporates core elements of *Fears of Islamization* mirror findings by Puschmann, Ausserhofer, & Šlerka (2020, p. 238), whose investigation of comments posted on PEGIDA's Facebook page show that the "topic *Refugees* peaks in October 2015, along with asylum applications in Europe," while there is a "relative decline in the topics Islam and the Media."

It also becomes clear that PEGIDA considered the "refugee crisis" as an opportunity structure to revitalize its message and

⁹ This speaker's last name is unknown.

¹⁰ PEGIDA's distinctive Saxonian and Eastern German character is still important. While Western Germany is associated with crime and cultural degeneracy, Eastern Germany appears as the authentic Germany: a place not yet tainted by the "multicultural madness" of Munich, Frankfurt, or Cologne. In this sense, PEGIDA localizes "global developments in a peculiar way" (Bock, 2019, p. 224).

reinterpret the populist meta-contrast between a homogeneous and positively connotated in-group and a threatening and negatively connotated out-group. Already dominant from the outset, this contrast is reinforced by blending different out-group characteristics (e.g., religion, ethnicity, or immigration status) *ad libitum* and refusing any acknowledgment of their complexity. Islamic societies from the *maghreb* to the *mashreq* appear monolithic, their cultural mentality being cut from the same transtemporal cloth that allows for neither change nor adaptation. Likewise, at the individual level, the Lebanese student, the refugee from Somalia, and the German-born son of Egyptian immigrants are all regarded as part of the same anti-Occident alliance against which vigorous resistance must be mounted.

Whereas the two master frames give the impression of a threat that is ubiquitous and manifests in different ways, PEGIDA's self-image is clear. Dealing with a "political class" that is viewed as too ignorant to realize what is at stake, too out of touch to really care about it, or even supportive of what must be considered high treason, PEGIDA speakers present themselves as authentic champions of an overwhelmed people (Volk, 2020). This kind of authenticity is also expressed through a sarcastic and brutal language that seeks to ridicule the "Other" and cultivates a community spirit built upon civilizationist notions of belonging. *Speaking truth to power* is what PEGIDA speakers claim to do – and while their "truths" may be contradictory (e.g., immigrants refuse to integrate *versus* immigrants are too well integrated), there is an *emotional* element to them that is of far greater importance than their *factual* foundation.

Though the case of PEGIDA substantiates the idea that moments of crisis bear significant potential for right-wing populist social movements, there are limitations to our examination that must be acknowledged. First, to keep our data manageable, we analyzed only a limited number of rallies and did not evaluate whether PEGIDA's framing affected the political priorities of its supporters and sympathizers.

Furthermore, we analyzed a constellation characterized by significant issue proximity: As both master frames were tied into the same populist undercurrents, PEGIDA speakers had few problems establishing a discursive continuum between fears of an *Islamic takeover* and of a *refugee invasion*. Arguably, other crises may provide less fertile ground in this regard as it is more difficult to frame them as similarly meaningful threats to the mystical *Abendland* that has successfully survived centuries of plagues and catastrophes.

Moreover, one should be aware that the stimulating impact of the "refugee crisis" was temporary rather than permanent and did not prevent PEGIDA from disintegrating and falling into the abyss of political irrelevance. While its supporters continue to march in Dresden¹¹ and have celebrated their 200th *Spaziergang* as recently as February 2020, their number today is negligible and their discursive power greatly restrained. In retrospect, PEGIDA appears as a red giant in the vastness of Europe's and Germany's right-wing populist galaxy: luminous and stunning at first but bound to collapse and fade from our vision. At least in part, this collapse may be the result of the movement's decentralized nature (which made it difficult to use frames strategically) and its radical language (which scared off many moderate sympathizers). In any case, PEGIDA proved unable to cement the dialogicality of its frames, with even the AfD developing an ambiguous stance toward what was once seen as a natural ally (Korsch, 2016).

Thus, if we were to generalize, a possible inference could be that populist parties enjoy structural advantages over populist social movements. They are (1) more flexible when it comes to adapting their message in the wake of crises, and (2) better equipped to develop long-term strategies to exploit them. But to validate these two assumptions and draw additional insights,

¹¹ Due to the COVID-19 pandemic, PEGIDA's rallies were suspended in early 2020 but later resumed. However, in the face of the pandemic's *second wave* (from September 2020), the *sixth anniversary rally* of the movement was cancelled by state authorities.

more research on populist communication is still required. Such research may include, but is not limited to, comparisons between PEGIDA and other populist social movements, critical discourse analysis to lay bare the determinants of its *modus operandi*, and detailed explorations of how the two master frames described in this article have developed after 2016.

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Conflict of interest

The authors declare no conflict of interests.

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Populist online communication: Interactions among politicians, journalists, and citizens (Dissertation summary)

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Swiss Association of Communication and Media Research (SACM) – Dissertation Award 2021

Sina Blassnig has been awarded the SACM Dissertation Prize 2021, which honors the best PhD thesis in communication and media sciences completed at a Swiss university or by a Swiss researcher. SComS is happy to publish a summary of Sina Blassnig's (University of Zurich) winning PhD thesis entitled "Populist online communication: Interactions among politicians, journalists, and citizens".

Abstract

The recent rise of populist politicians in Western democracies is often associated with their allegedly successful use of digital media. However, for a long time, there has been little research specifically on populist online communication. To address this substantial research gap, the thesis pursues two major research aims: First, it investigates drivers of populist communication in politicians' online self-presentation and online news media representation. Second, the thesis examines the effects of populist online communication on citizens' behavior in the form of user reactions to politicians' social media posts and reader comments on online news articles. Based on five internationally comparative studies and the overarching synopsis, the cumulative thesis demonstrates that populist online communication is driven by the reciprocal interactions among politicians, journalists, and citizens and is influenced by various factors on the macro, meso, and micro level. Furthermore, it shows that populist online communication resonates with citizens and is multiplied by them – specifically by citizens with prior strong populist attitudes. By analyzing the interactions of three key actor groups – politicians, journalists, and citizens – and by following a multimethod approach the dissertation connects research on both the supply and demand side of populism.

Keywords

populism, online communication, online news, social media, user reactions

1 Introduction

"The others have newspapers, radio, television, banks, and corporate money – we have you, we have the network,"¹ Matteo Salvini (2018) told his followers in a video posted on Facebook in February 2018, one month before the leader of the populist right-wing party Lega Nord became Minister of the Interior and Deputy Prime Minister of Italy. Salvini's message is reminiscent of statements by other politicians. In recent years, the open disdain that mostly

right-wing – as well as some left-wing – politicians have shown for the mainstream news media has been a recurrent theme in political campaigns in Western democracies. Relatedly, the attempts of these politicians to bypass the mainstream news media through social media are frequently discussed. In particular, the rise of populist politicians and parties is often associated with their allegedly successful use of social networking sites – and often seen as signs of a "populist Zeitgeist" that Mudde (2004) had predicted more than a decade earlier.

1 Translation by the author.



At the end of the last century, Blumler and Kavanagh (1999, pp. 219–220) argued that the expansion of media outlets and the associated new opportunities for the public to become politically active would increase populist tendencies and anti-elitist popularization. Around the same time, Bimber (1998) claimed that the Internet might promote an “unmediated” communication between citizens and the government that would increase citizen influence on politics at the expense of elites and political intermediaries, such as traditional political parties and the mainstream press. Today, the assumption that politicians use the Internet to bypass traditional mass media and communicate directly with their followers is mostly applied to their self-presentation on social media (e.g., Parmelee & Bichard, 2012). As the quote above shows, populists often make this claim themselves. At the same time, populist actors regularly succeed in attracting the attention of the mass media with their provocative statements that cater to media logic and news values (Mazzoleni, 2008). Thus, in a hybrid media system (Chadwick, 2017), populist actors may also use social media to gain attention in the mass media. The digitization of traditional news media leads to an increased commercialization and audience orientation that could make online news media even more susceptible to populist statements (Aalberg & de Vreese, 2017). Furthermore, online media provide citizens with more possibilities for direct feedback and interaction, for example via likes, shares, or comments.

Scholarly awareness of the crucial role of populist communication and empirical research in this area have increased immensely in the last few years. However, despite the early linking of populism and the Internet by Bimber (1998), for a long time there was hardly any scientific knowledge about the occurrence and effects of populist *online* communication. Thus, many questions remain unanswered. First, there is still scarce research on what constitutes the supposed affinity between digital media and populism, to what extent actors use populist communication online, and what contextual factors or op-

portunity structures promote the use of populist online communication. Second, whereas research on populism and social media has increased, these platforms are still often looked at in isolation and rarely compared to other digital or traditional communication channels as part of a larger information system (de Vreese, Esser, Aalberg, Reinemann, & Stanyer, 2018). Specifically, the role of online news media has been neglected, despite the fact that the mass media continue to play a central part in the rise of recent populist actors (e.g., Esser, Stępińska, & Hopmann, 2017). Third, although vast literature argues that citizens have come to play a more active part in digital journalism, their role in populist communication remains under-researched. Very few studies investigate the effects of populist communication on citizens’ behavior or specifically in an online context. Moreover, there are only few field studies that examine the effects of populist communication outside of an experimental context. Finally, the supply side and the demand side of populism are still mostly looked at separately. To address these substantial research gaps, the dissertation sets out to answer two overarching questions:

1. What are the *drivers* of populist online communication with regard to (a) politicians’ online self-presentation and (b) its representation in the online news media?
2. What *effects* does populist online communication have on citizens’ reactions in response to (a) politicians’ self-presentation and (b) its representation in the online news media?

These questions build the foundation of the cumulative dissertation and are empirically assessed in five related publications. The dissertation extends previous research by looking at populist communication across different online media platforms and by investigating the interaction of three key actor groups – (1) politicians, (2) journalists, and (3) citizens – that have so far often been investigated separately. I analyze (1) how *politicians* use populist

communication in their self-presentation, (2) how *journalists* represent populist ideas in the mass media, and (3) how *citizens* respond to populist communication in the form of user reactions to politicians' social media posts and reader comments in response to online news articles. With regard to politicians' self-presentation, I contribute to the literature by examining populism in the communication of a broad range of political actors across the political spectrum and different communication channels. In relation to the role of journalists, as de Vreese et al. (2018, p. 432) urge, I consider the media both as a platform for transmitting populist messages by politicians *through* the media and as possible initiators of populist messages in the form of populism *by* the media (Esser et al., 2017). With regard to citizens, I explore the role of *populist citizen journalism* (Esser et al., 2017) in the form of populist reader comments as well as the effects of populist online communication on citizens' manifest behavior in the form of popularity cues (Porten-Che , Ha ler, Jost, Eilders, & Maurer, 2018). Finally, by investigating both drivers and effects of populist online communication and by combining content analysis, digital trace data, and an experimental survey, I connect research on the supply side and the demand side of populism.

2 Theoretical framework

The thesis follows an ideational approach (Hawkins & Kaltwasser, 2018) and understands populism as a "thin" ideology that describes a Manichean conflict between "the people" and "the elite" over sovereignty in society (Mudde, 2004). Furthermore, the homogenous conceptualization of "the people" as the favored in-group implies that there are specific social groups that are excluded from the people as "others" (Albertazzi & McDonnell, 2008). Depending on the parsimony of the conceptualization, populism as a "thin" ideology therefore consists of three (M ny & Surel, 2002; Wirth et al., 2016) or four (Albertazzi & McDonnell, 2008; Engesser,

Fawzi, & Larsson, 2017) dimensions: *people-centrism*, *anti-elitism*, *popular sovereignty*, and *the exclusion of "others"*.

On the supply side, populism can be investigated in the form of populist communication that manifests in political discourse. Populist ideology can be communicated by various actors by means of specific populist key messages. From a political communication perspective, three key actor groups are of particular interest as populist communicators: political actors, the media, and citizens (de Vreese et al., 2018). On the demand side, populism manifests in the form of populist attitudes of citizens at the individual or aggregated mass level (Akkerman, Mudde, & Zaslove, 2014). These populist attitudes can be conceived of as a latent demand or a disposition that can be activated by populist communication (Hawkins & Kaltwasser, 2018; Kr mer, 2014). Furthermore, populist communication is expected to have effects on different attitudes and behaviors of citizens that may be explained theoretically by priming, framing, blame attributions, social identity theory, or emotional persuasion processes (Hameleers, Bos, & de Vreese, 2017; Hawkins & Kaltwasser, 2018; Kr mer, 2014; Wirz, 2018).

Recent literature suggests that online and social media provide specific opportunity structures for populist communication and populist actors (Aalberg & de Vreese, 2017; Engesser et al., 2017). However, within a hybrid media system, older and newer media logics compete and complement each other (Chadwick, 2017, p. 207). This hybridity becomes visible in the interplay not only between online and offline channels but also within political online communication. In addition to noninstitutionalized online communication platforms such as social media, traditional, well-known media brands have established themselves online (see, e.g., Humprecht, 2016). Journalistic and social media outlets follow different media logics, which may influence their roles as platforms for populist communication. Furthermore, online media allow for a more direct interaction between politicians, journalists, and citizens within the

same platforms and therefore potentially change the relationship between these three actor groups. Therefore, populist online communication is conceptualized as the interplay between (1) populist communication in politicians' online self-presentation, (2) journalists' online media representation of populist communication, and (3) citizens' responses to this written and posted content in the form of audience reactions.

Following a communication-centered approach (Stanyer, Salgado, & Strömback, 2017), it is assumed that *politicians'* communication can be populist to varying degrees. This leads to the question of what factors might explain the use of populist key messages. First, characteristics of the communication channel may act as drivers of populism in politicians' self-presentation. Specifically, news media logic, network media logic, or generally a highly audience-oriented logic offer several opportunity structures for populist communication (Ernst, Engesser, Büchel, Blassnig, & Esser, 2017; Landerer, 2013; Mazzoleni, 2008). In addition, specific characteristics of political parties such as an extreme ideological position have been identified as potential drivers of populist communication in politicians' self-presentation (Ernst et al., 2017; Ernst, Esser, Blassnig, & Engesser, 2019).

Despite the growing importance of social media, the news media are crucial for the wider dissemination of populist communication. *Journalists* can take on different roles as initiators, gatekeepers, or interpreters of populist messages (Wettstein, Esser, Schulz, Wirz, & Wirth, 2018). First, as *initiators* journalists can express populist ideas themselves in the form of populism *by* the media (Esser et al., 2017). Second, described as populism *through* the media, journalists as *gatekeepers* can disseminate and thereby reinforce populist messages by other actors, mostly by politicians (Esser et al., 2017). Third, as *interpreters* of populist messages, journalists can attenuate or amplify, criticize, or legitimize populist messages by politicians (Wettstein et al., 2018). In online news outlets, journalists may be specifically likely to

voice or cite populist statements due to an increasing audience orientation, the attention economy, commercialization, and an orientation toward news values and network media logic. Additionally, specific characteristics of news coverage, such as opinion-oriented formats or interpretative journalism, may act as drivers of populist online communication. Finally, these tendencies may be reinforced by soliciting the active feedback, distribution, and participation of readers.

The increasing audience-orientation and possibilities for citizens' direct feedback in an online environment make *citizens* the third central actor group for populist online communication. The dissertation examines both the effects of populist communication on citizens as *recipients* and on their subsequent behavior as *actors* in populist communicative interactions (de Vreese et al., 2018). Thereby, I specifically focus on three aspects: (1) user reactions to populist communication in the form of popularity cues (Porten-Cheé et al., 2018); (2) reader comments as populist citizen journalism (Esser et al., 2017); and (3) how the former two aspects can be conceptualized as effects of populist communication. In this regard, the thesis integrates theoretical perspectives on network media logic (Klinger & Svensson, 2015), the role of reader comments in the online public sphere (Dahlberg, 2001; Freelon, 2015; Toepfl & Piwoni, 2015), and different persuasion processes such as schema theory (Krämer, 2014), priming (Roskos-Ewoldsen, Roskos-Ewoldsen, & Carpenter, 2002), and social identity theory (van Zomeren, Postmes, & Spears, 2008).

3 Method and data

The cumulative dissertation comprises five publications that draw on four data collections to investigate populist communication across different countries and communication contexts. I analyze social media posts of politicians, online news media content, and their effects on citizens' reactions in the form of popularity cues and reader comments in up to six

countries. Thereby, I draw on quantitative content analysis, digital trace data, and an online survey experiment to combine the supply and demand sides and to complement the advantages and disadvantages of the different approaches.

3.1 Comparative approach

The dissertation follows a comparative approach, analyzing the manifestation of populist communication and its effects across different countries, communication channels, and actor types. All content analyses (*Articles I–IV*) include several countries in their research design. However, they differ somewhat in their approach. *Article I* follows the most explicit comparative approach by comparing the use of populist communication across four countries – Switzerland (CH), Germany (DE), the United Kingdom (UK), and the United States (US) – and by investigating structural aspects on the macro level as explanatory factors. This allows investigating politicians' use of populist communication in varying political and electoral settings and explaining differences and similarities through different contextual settings (Esser & Hanitzsch, 2012). In *Articles II, III, and IV*, the comparative approach serves more as a comparison of relations, in which the different contexts work as a robustness check and enable a higher generalizability of the findings within Western Europe (Esser & Vliegthart, 2017). *Articles II and IV* follow a most different systems within most similar systems design in the selection of the countries (Switzerland, France, and United Kingdom). For *Article III*, six Western democracies were selected: Switzerland (CH), Germany (DE), France (FR), Italy (IT), the United Kingdom (UK), and the United States (US), providing even more diverse contexts.

3.2 Research design, methods, and data

Article I is based on a quantitative content analysis of politicians' statements in political talk shows and on social media (Facebook and Twitter) in four countries (CH, DE, UK, US). The material was manually coded by the author of the disser-

tation. This study focuses on politicians' self-presentation and includes statements by 74 politicians across the political spectrum during a routine time in 2014 ($N=2454$) (for more details see Blassnig, Ernst, Büchel, & Engesser, 2018).

Articles II and IV draw on a quantitative content analysis of online news coverage related to the topic of immigration and responding reader comments during national election campaigns in France (2017), Switzerland (2015), and the United Kingdom (2015). These data were manually coded by a team of intensively trained student coders. The data set includes $N=493$ news articles from 14 online media outlets and $N=2904$ reader comments (for more details see Blassnig, Engesser, Ernst, & Esser, 2019; Blassnig, Ernst, Büchel, Engesser, & Esser, 2019).

Article III is based on a quantitative content analysis of Facebook posts and tweets from 36 political leaders of 29 parties ($N=566$) across six countries (CH, DE, FR, IT, UK, US) during a routine time in 2015. Again, these data were manually coded by a team of intensively trained student coders (for more details see Blassnig, Ernst, Engesser, & Esser, 2020).

Article V draws on data from an online survey experiment with a 2×2 design. The experiment was conducted in Switzerland in 2019. The participants were recruited by a market research company from its online access panel using quota sampling for age, gender, and education based on Eurostat data for German-speaking Facebook users in Switzerland ($N=647$) (for more details see Blassnig & Wirz, 2019).

3.3 Operationalization of populist communication

The most crucial variable of the dissertation is populist communication. It serves as the dependent variable in *Articles I, II, and IV*, as an independent variable in *Articles III and IV*, and as the experimental factor in *Article V*. Its operationalization was derived directly from the theoretical definition of populist ideology, building on previous literature (Cranmer, 2011; Ernst et al., 2017; Jagers & Walgrave, 2007; Wirth et al., 2016). Overall, populist communi-

cation is regarded as a formative measure, based on twelve populist key messages related to the four dimensions people-centrism, anti-elitism, restoring sovereignty, and the exclusion of others.

4 Key findings

Article I (Blassnig et al., 2018) focuses on politicians' self-presentation. It investigates how politicians across the political spectrum employ populist communication in talk shows and on social media in four countries and shows that populist communication is context-dependent. It finds a most *complete* populism in Switzerland, a more *anti-elitist* populism in Germany and the United Kingdom, and a mostly *empty* populism in the United States. Moreover, the politicians' communication is more populist in talk shows than on social media, and extreme parties are more anti-elitist and excluding but not more people-centrist than moderate or center parties are.

Article II (Blassnig, Ernst, et al., 2019) shifts the focus from social media to online news coverage and attendant reader comments. The paper provides empirical evidence for the distinction between populism *by* the media and populism *through* the media (Esser et al., 2017). It finds that, first, the majority of populist key messages in online news articles originate from politicians, not from journalists. Second, populist communication by journalists is higher in opinion-oriented stories, whereas populism by political actors is higher in straight news articles. Third, journalists rarely explicitly attenuate or criticize populist statements by political actors. Finally, the article finds that the reader comment sections are more populist than the online news articles.

Article III (Blassnig et al., 2020) investigates the effects of populist communication in political leaders' self-presentation on social media on the number of popularity cues they receive. It finds that populist posts receive more popularity cues than non-populist posts – but only on Facebook not on Twitter. Posts of po-

litical leaders that communicate more populist on average, have a higher popularity or reach on both platforms. Leaders of pre-defined typical populist parties receive a higher social media response than leaders of typically non-populist parties overall – but they do not profit more from communicating populist key messages.

Article IV (Blassnig, Engesser, et al., 2019) focuses more closely on citizens and an effects perspective by analyzing how populist statements by journalists and politicians in online news articles affect the number and content of reader comments by citizens. The article demonstrates that populist communication by politicians and journalists in online news triggers (a) more frequent reader comments and (b) more populist reader comments, (c) regardless of whether the journalists moderate populist messages by political actors or not.

Article V (Blassnig & Wirz, 2019) is based on an experimental survey with a 2×2 design comparing populist vs. non-populist messages in Facebook posts by typically populist vs. non-populist politicians as the source of the message. The results show that both, populist messages and populist actors, foster the recipients' perception of a Facebook post as populist, but only populist messages are drivers of user reactions. The study further demonstrates that the effect of populist communication on user reactions is moderated by recipients' prior populist attitudes: Only users with strong populist attitudes are more likely to share populist messages than non-populist messages. Finally, this study finds an unexpected negative interaction between populist communication and populist actor; recipients were more likely to react – specifically to comment – on populist messages if they came from the non-populist actor.

The key findings of the dissertation can be connected and summarized in four main conclusions with regard to populist online communication: First, *politicians' self-presentation on social media is not inherently more populist* compared to other communication channels. Although social media provide several opportunity

structures for populist communication, politicians' use thereof is influenced by additional factors such as the situational context, the issue, or party characteristics. However, populist social media messages may receive disproportional attention, both directly from followers – specifically on Facebook – and indirectly via traditional mass media. Therefore, politicians may use social media not only to circumvent gatekeepers and directly reach their followers but also to gain attention in the news media.

Second, *journalists seldom voice populist ideas themselves, but they readily provide a stage for populist messages* by political actors in online news articles as well as by citizens in reader comments. Thus, journalists mainly act as gatekeepers for the dissemination of populist communication online and less as initiators or interpreters of populist messages. However, opinion-oriented journalism acts as a driver of populism by the media.

Third, *populist online communication triggers more audience reactions and the expression of populist messages by citizens*. Online populist communication (a) *resonates* with citizens by triggering more popularity cues on social media and more reader comments on online news platforms, and (b) *multiplies* by eliciting populist messages by citizens in reader comments. Thus, within an online context, citizens become a more central actor for the expression and dissemination of populist ideas.

Fourth, *citizens' populist attitudes moderate the effects of populist online communication on audience reactions*. Thus, only a limited, specific group of people spreads populist ideas online. Yet, this group seems to be especially active on social media and in comment sections and therefore contributes to the impression of an overrepresentation of populist messages.

5 Concluding discussion and contribution

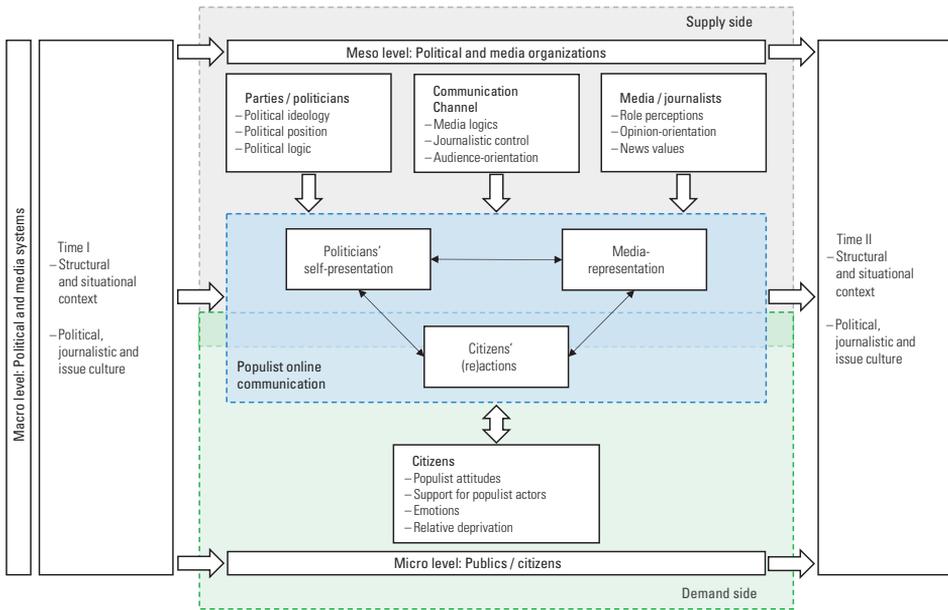
Research on populism has long focused on the supply side, specifically on political

actors. Only more recently has the role of the media in the dissemination of populist communication been taken into account. Furthermore, for a long time, citizens have been neglected as actors and have only been considered – at most – in their role as passive recipients of populist messages. However, the dissertation shows that the roles of politicians, the media, and citizens have become more interconnected and reciprocal in an online communication environment. Moreover, the boundary between the supply and the demand side has become increasingly blurred (see also Hameleers, 2018). This blurring must be considered when investigating the drivers and effects of populist online communication.

Based on these considerations, in the synopsis of my thesis (Blassnig, 2020) I propose a heuristic model of populist online communication that integrates the lessons learned in the dissertation and findings from the broader literature. As Figure 1 depicts, at the heart of this heuristic model lie the three components that together constitute populist online communication in its manifested form: (1) *politicians' self-presentation*, (2) *journalistic media representation*, and (3) *citizens' (re) actions*. As the double-headed arrows indicate, the three key aspects are expected to mutually influence each other. Additionally, the model includes influencing factors on three levels: (a) structural, situational, and cultural context factors on the *macro level*; (b) characteristics of political organizations, media organizations, and communication channels on the *meso level*; and (c) characteristics of citizens on the *micro level*. In this brief summary, I want to focus on certain aspects that highlight the contribution of the dissertation.

Regarding politicians' self-presentation, the findings imply that populism in politicians' self-presentation may be influenced reciprocally by the media representation and citizens' reactions and by politicians' anticipation of their logics and response. This suggests a rather strategic use of populist communication by political actors to get attention from voters or in the media. If politicians presume that pop-

Figure 1: Heuristic model for research on populist online presentation



Note. Own presentation based on Blassnig (2020).

ulist messages might receive more attention in the news media and more popularity cues on social media, this could provide an incentive to use populist communication strategically.

The media representation of populist communication is influenced by characteristics of media organizations, journalists, and the communication channel. The predominance of populism through the media found in the dissertation can be explained by populism's fit with media logic and news values. Additionally, populism in politicians' self-presentation is expected to drive populism through the media, as journalists closely monitor politicians' social media statements and increasingly incorporate them as quotes in articles. For populism by the media, opinion orientation or interpretative journalism were identified as drivers. Thus, populism in online news could be driven or inhibited by specific journalistic role perceptions.

Citizens' (re)actions, finally, comprise reactions by citizens to populist messages by politicians or journalists as well as populist messages by citizens themselves. On

the one hand, the dissertation argues that citizens' reactions are driven by populism in politicians' self-presentation and in the media representation. Thus, when considering citizens' role as recipients, audience reactions can be interpreted as effects of populist communication. On the other hand, I argue that citizens can exert a more active role within an online environment as initiators, gatewatchers (Bruns, 2018), or interpreters of populist messages.

This has two implications for the relationship between the demand and the supply side of populist communication. First, the distinction between the two is becoming increasingly blurry and overlapping, as citizens can be both recipients and senders of populist messages (Hameleers, 2018). Second, these findings can be connected to a general "shift from a supply to a demand market in communication" (Brants & van Praag, 2015, p. 395). Journalists and politicians increasingly anticipate what they assume to be the people's needs, requests, frustrations, and resentments and adapt their behavior or communication accordingly (Brants & van Praag, 2015,

p. 404). This implies that populism in politicians' self-presentation and in the media is driven reciprocally by the anticipation of citizens' demands and reactions.

Overall, the model suggests that populist online communication is the outcome of the reciprocal interactions among politicians, journalists, and citizens, in which different logics interact, merge, and collide, and that is driven or inhibited by various factors on the macro, meso, and micro level. In this sense, many of the findings can be applied to political online communication in general. However, the dissertation looked only at a small selection of factors on these different levels of influence. Therefore, I see the proposed model not as exhaustive but more as a guiding concept for future research.

The dissertation also provides relevant societal and practical implications for politicians, the media, and citizens in liberal democracies. Regarding politicians, the findings imply that it could make sense to strategically adopt populist communication or focus on populism-affine issues to gain more attention by both the media and citizens. However, mainstream politicians may also face a backlash from voters – specifically from those with low populist attitudes – if they suddenly imitate populist actors. In terms of the media, the dissertation has demonstrated that most populism in online news stems either from cited statements by politicians that are often disseminated uncritically, opinion-oriented formats, or reader comments. Therefore, journalists and media organizations must critically reflect their role as gatekeepers and interpreters of populist messages by politicians and citizens. For instance, journalists should not mistake popularity for relevance (Bruns, 2018, pp. 230–231). Another central finding is that populism in social media posts or news articles leads to more frequent and more populist reactions by citizens. Considering populism's problematic stance on central ideas of liberal democracy, this multiplication and propagation of populist ideas to a larger audience through citizens is highly problematic. In contrast, from the viewpoint of participatory de-

mocracy, it can also be interpreted as positive if populist communication would contribute to the increased participation of citizens and possibly opinion diversity in the online public sphere. Yet, liking, sharing, or commenting provides citizens with an easy means of responding directly and immediately to politicians or journalists online, but may not actually translate into real-world political actions or influence. This “lopsided efficacy” (Blumler, 2013) may further deepen the perceived chasm between “the people” and “the elite” that is propagated by populist ideology. Finally, the dissertation shows that specific groups are more likely to react to populist messages than others are. This finding corroborates earlier research and reinforces the argument that populist communication contributes to an increasing polarization of society into populist and anti-populist camps (see also Müller et al., 2017; Wirz, 2019). These developments present politicians, journalists, and citizens with major challenges and require further investigation. I hope that my dissertation will provide the foundation and serve as inspiration for such future research.

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Conflict of interests

The author declares no conflict of interests.

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Nachruf auf Michael Schanne

Wissenschafts-, Risiko- und Gesundheitskommunikation als zentrale Forschungsfelder

Mit einer Auswahlbibliographie

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Michael Schanne (27.6.1948–30.8.2021) studierte Soziologie, Publizistikwissenschaft und Politikwissenschaft an der Universität Zürich und schloss sein Studium 1977 mit Lizentiat bei Prof. Peter Heintz in Soziologie ab. Danach war er Assistent am Seminar für Publizistikwissenschaft bei Prof. Ulrich Saxer bis Mitte der 1980er Jahre. 1987 gründete er mit Werner A. Meier die AGK – Arbeitsgruppe für Kommunikationsforschung und -beratung und führte u. a. im Rahmen von Evaluationen zahlreiche Inhaltsanalysen durch sowie qualitative Forschungsprojekte basierend auf Experteninterviews. Von 2001 bis zu seiner Pensionierung 2013 forschte und lehrte er an der ZHAW – Zürcher Hochschule für Angewandte Wissenschaften zusammen mit Vinzenz Wyss an der Professur für Journalistik.

Michael Schanne befasste sich in zahlreichen wissenschaftlichen Publikationen mit vielfältigen Themen aus der Wissenschafts-, Risiko- und Gesundheitskommunikation und insbesondere mit dem Verhältnis von Wissenschaft und Journalismus. Sein wissenschaftliches Wirken hinterliess bereits in den frühen 1980er Jahren nachhaltige Spuren. Zu nennen sind u. a. Forschungsaktivitäten und Veröffentlichungen zu den Nachrichtenagenturen im internationalen Kontext und zur RVO Rundfunkversuchsverordnung zur Einführung der kommerziellen Lokalradios in der Schweiz ab Mitte der 1980er Jahre, zu den Risiken von Kernenergie und Gentechnologie oder des Mobilfunks, aber

auch zum Mediensystem, dem Journalismus und den Medienschaffenden in der Schweiz sowie zur Mediengeschichte.

Transdisziplinarität war stets ein grosses Anliegen, das er in vielen anwendungsorientierten Forschungsprojekten an der ZHAW umzusetzen vermochte; so etwa zusammen mit Angelica Hüsser, Iris Herrmann-Giovanelli und Carmen Koch zu Wissenschafts- bzw. Hochschulkommunikation und Wissenschaftsjournalismus (2004–2017) oder mit Christoph Spurk in drei Projekten über *Health Journalism* in Kenia, *Science Journalism* in Afrika und zu *Farmer Communication* in Kenia (2013). Er ist in seinen Publikationen immer reflektiert und der (Kommunikations-) Wissenschaft gegenüber durchaus kritisch eingestellt gewesen.

Dem ausgesprochenen Teamplayer Michael Schanne gelang es, nicht nur die Studierenden, sondern auch den wissenschaftlichen Nachwuchs zu begeistern, ohne jedoch seine kritische Distanz gegenüber dem Wissenschaftssystem und gegenüber der Kommunikationswissenschaft zu verleugnen.

Studierende, seine Arbeitskolleginnen und -kollegen sowie seine Weggefährten halten Michael Schanne als einen aussergewöhnlich lebenswürdigen, herzensoffenen und grosszügigen Menschen in Erinnerung.



Auswahlbibliographie Michael Schanne

Berücksichtigt wurden Publikationen in Fachzeitschriften und Verlagen, ohne interne Berichte der ZHAW oder für Auftraggeber.

2017

Mental health and journalism – chances and risks. In S. Bährer-Köhler & F. J. Carrod-Artal (Hrsg.), *Global mental health. Prevention and promotion* (S. 223–233). Cham: Springer. (gemeinsam mit Angelica Hüsser)

2014

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Reviews and Reports

Volume 21 (2021), Issue 2

Philomen Schönhagen & Mike Meißner. Kommunikations- und Mediengeschichte. Von Versammlungen bis zu den digitalen Medien. Köln: Herbert von Halem, 2021, 194 Seiten. ISBN: 978-3-86962-588-1

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(Version française en bas / Versione italiana sotto)

Philomen Schönhagen legt zusammen mit Mike Meißner eine Kommunikations- und Mediengeschichte vor, die den Fokus vor allem auf die Schweiz legt. Das fehlte bisher. Es gibt Medien- und Journalismusgeschichten Frankreichs, Deutschlands, Italiens, weltweit, es gibt das Handbuch der Mediengeschichte von Helmut Schanze, aber an eine Gesamtschau für die Schweiz hat sich seit langem niemand gewagt. Vielmehr blühten in Helvetien kantonale Mediengeschichten, Medien- und Pressegeschichten einzelner Epochen, die Geschichte von Medienunternehmen (beispielsweise der SRG oder von Ringier), die Geschichte einzelner Medien (etwa des «Tages-Anzeigers» oder der NZZ), die Geschichte einzelner Etappen der Medienpolitik, die Geschichte des Journalismus in begrenzten Kontexten (zum Beispiel der italienischen Schweiz) oder die kommunikationswissenschaftliche Fachgeschichte.

Es gab bisher erst vier Versuche, die Mediengeschichte der Schweiz ganzheitlich einzufangen: Ende des 19. Jahrhunderts beschrieb der Journalist und Politiker Theodor Curti die Anfänge der Presse, allerdings beschränkt auf die deutschsprachige Schweiz. 40 Jahre später wagte sich der Historiker und Publizistikwissenschaftler Karl Weber an eine Gesamtdarstellung, wobei das Schwergewicht auf der politischen Presse lag; das Kino und das Radio blieben aussen vor. Wiederum 60 Jahre später bot der Publizistikwissenschaftler Michael Schanne einen Überblick, der im 15. Jahrhundert einsetzte und alle Medien einbezog. Und jetzt, nach weiteren drei Jahrzehnten, folgt eine systematische Geschichte der öffentlichen Kommunikation.

Ausgangspunkt für das konzis und klar aufgebaute Buch war die Vorlesung zur Kommunikations- und Mediengeschichte, die Philomen Schönhagen seit Jahren als Professorin an der Universität Freiburg (Schweiz) hält. Dies ist auch der Grund dafür, dass in jeder Epoche die schweizerische Entwicklung im Vordergrund steht, und so kommt die Schweiz unverhofft zu einer eigenen Kommunikations- und Mediengeschichte. Schönhagens früherer Mitarbeiter Mike Meißner hat sie bei der Realisierung des Buches unterstützt. Der Band ist schön illustriert. In elf Exkursen gehen die Autorin und der Autor auf historische Hintergründe, spezielle Begriffe und einzelne Medientypen ein. Sie stützen sich auf den vermittlungstheoretischen Ansatz. Es ist ein Hauptverdienst Philomen Schönhagens und Mike Meißners, dass sie deutlich machen, wie lange in der Menschheitsgeschichte die Versammlungskommunikation dominierte und wie diese erst Schritt für Schritt (und in der Schweiz nie ganz) durch die Kommunikation über Distanz ergänzt und ersetzt wurde. Trotz des knappen Umfangs ist das Buch ausserordentlich dicht an Informationen.

Philomen Schönhagen & Mike Meißner. Histoire de la communication et des médias. Des assemblées aux médias sociaux. Cologne : Herbert von Halem, 2021, 194 pages. ISBN : 978-3-86962-588-1

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Philomen Schönhagen, avec l'aide de Mike Meißner, propose une histoire de la com-



munication et des médias qui met l'accent sur la Suisse. Cela manquait jusque-là. Il existe des histoires des médias et du journalisme en France, en Allemagne, en Italie et dans le monde entier, il y a le manuel d'histoire des médias de Helmut Schlanze, mais il y avait longtemps que personne n'avait tenté de livrer une vue d'ensemble de la situation en Suisse. Au contraire, la Suisse regorge d'histoires cantonales des médias, d'histoires des médias et de la presse à certaines époques, d'histoires d'entreprises médiatiques (de la SSR ou de Ringier, par exemple), d'histoires de certains médias (p.ex. le Tages-Anzeiger ou la NZZ), d'histoires de certaines étapes de la politique des médias, d'histoires du journalisme dans un contexte particulier (par exemple au Tessin) ou d'histoires des sciences de la communication.

Jusqu'à présent, il n'y a eu que quatre tentatives pour saisir l'histoire des médias en Suisse de manière globale : à la fin du 19^{ème} siècle, le journaliste et politicien Theodor Curti a décrit les débuts de la presse, mais en se limitant à la Suisse alémanique. 40 ans plus tard, Karl Weber, historien et chercheur dans le domaine du journalisme, a tenté de donner une vue d'ensemble, mais en se concentrant sur la presse politique, laissant ainsi le cinéma et la radio de côté. Ce n'est que 60 ans plus tard que le spécialiste des médias Michael Schanne a proposé une vue d'ensemble débutant au 15^{ème} siècle et englobant tous les médias. Et voilà que, trois décennies plus tard, paraît une histoire systématique de la communication publique.

Le point de départ de cet ouvrage clair et concis est le cours dédié à l'histoire de la communication et des médias que Philomen Schönhagen donne pendant des années en tant que Professeure à l'Université de Fribourg (Suisse). C'est aussi pour cette raison que chaque époque est abordée sous l'angle du développement de la Suisse, ce qui donne lieu, de manière inattendue, à une véritable histoire de la communication et des médias en Suisse. L'ancien collaborateur de Philomen Schönhagen, Mike Meißner, a contribué à la réalisation de l'ouvrage. Il est agréablement illustré. Dans onze excursus, les deux

auteurs se penchent sur des contextes historiques, des termes spécifiques et différents types de médias. Ils s'appuient sur l'approche théorique de l'intermédiation. Le plus grand mérite du travail de Philomen Schönhagen et Mike Meißner est de mettre en lumière le temps pendant lequel l'histoire de l'humanité a été dominée par une communication d'assemblées avant d'être progressivement complétée et remplacée (jamais totalement en Suisse) par la communication à distance. Malgré sa concision, l'ouvrage est remarquablement riche en informations.

Philomen Schönhagen & Mike Meißner. Storia dei media e della comunicazione. Dalle assemblee ai media digitali. Colonia: Herbert von Halem, 2021, 194 pp. ISBN: 978-3-86962-588-1

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Philomen Schönhagen, insieme a Mike Meißner, presenta per la prima volta una ricerca sulla storia della comunicazione e dei media incentrata principalmente sulla Svizzera. Fino ad oggi esistono studi sulla storia dei media e del giornalismo in Francia, Germania, Italia e a livello mondiale, oltre al manuale sulla storia dei media di Helmut Schanze. Tuttavia, per molto tempo, mentre sono comparsi contributi sulla storia storia dei media e della stampa a livello cantonale, sulla storia delle aziende mediatiche (per esempio della SSR o di Ringier), sulla storia di singoli media (per esempio del Tages-Anzeiger o della NZZ), sulla storia di singole fasi della politica dei media, sulla storia del giornalismo in determinati contesti (per esempio in quello della Svizzera italiana) e sulla storia delle scienze della comunicazione, nessuno si era impegnato a fornire una visione generale per la Svizzera.

Sono stati finora solo quattro i tentativi di ricostruire la storia dei media svizzeri nel loro insieme: alla fine del XIX secolo il giornalista e politico Theodor Curti descrisse le origini della stampa limitandosi tuttavia alla Svizzera tedesca. Quarant'anni

ni dopo, lo storico e pubblicista Karl Weber si cimentò in una presentazione generale focalizzata sulla stampa politica, escludendo il cinema e la radio. Sessant'anni dopo anche il pubblicista Michael Schanne offrì una panoramica includendo tutti i media a partire dal XV secolo. E ora, dopo altri tre decenni, segue uno studio sistematico sulla storia della comunicazione sociale.

Come punto di partenza di questo libro conciso e ben strutturato vi è la lezione sulla storia della comunicazione e dei media tiene da anni da Philomen Schönhagen, professoressa all'Università di Friburgo (Svizzera). Anche per questo motivo, in ogni epoca lo sviluppo della società svizzera viene messo in primo piano, portando così la Svizzera in modo inatteso ad avere una propria storia della comunicazione e dei media. L'ex collaboratore di Schönhagen, Mike Meißner, le è stato di supporto durante la stesura del libro. Il volume è ben illustrato. In undici excursus gli autori approfondiscono contesti storici, termini specifici e singole tipologie di media, basandosi sul principio della teoria della mediazione. Il merito principale di Philomen Schönhagen e di Mike Meißner è quello di aver chiarito per quanto tempo la comunicazione assembleare abbia dominato nella storia dell'umanità e come questa sia stata affiancata gradualmente (e in Svizzera mai interamente) e poi sostituita dalla comunicazione a distanza. Nonostante il libro sia di piccole dimensioni è straordinariamente ricco di informazioni.

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Stephan Russ-Mohl (Hrsg.). Streitlust und Streitkunst. Diskurs als Essenz der Demokratie. Köln: Herbert von Halem, 2020, pp. 471. ISBN 978-3-86962-552-2

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Unser Planet wird von globalen Krisen erschüttert. Wir erleben «Wandel» derzeit hautnah, auf ganz verschiedenen Ebenen. Die Frage, wie wir kommunizieren, ist deshalb von elementarer Bedeutung. Mittels Kommunikation bewahren oder entwickeln wir im Angesicht von Risiken gemeinsame Denk- und Handlungsspielräume. Es sind deshalb alle Initiativen zu begrüßen, die den kommunikativen Austausch zwischen Individuen und Institutionen beleuchten und kritisch hinterfragen. Zum einen, weil vieles in unseren herkömmlichen Kommunikationspraxen dringender Anstrengungen zur Verbesserung bedarf. Zum anderen aber auch, weil genauso vieles dringend restaurierungs- bzw. erneuerungswürdig ist. In diesem Sinn wirft diese Rezension einige Schlaglichter auf eine vielversprechende Buchreihe, die im Kölner Herbert von Halem-Verlag erscheint und vom emeritierten Professor für Journalistik und Medienmanagement Stephan Russ-Mohl kuratiert wird. Es geht im Folgenden also um die «Schriften zur Rettung des öffentlichen Diskurses».

Präludium: Einige Begriffsbestimmungen vorab

Während die einen für das geläufige Bezeichnen angenommener politischer Ausrichtungen bzw. Haltungen (gemeint: in politischen Debatten), ohne gross darüber nachzudenken, räumliche Begriffe wählen und dann behaupten, jemand oder etwas stehe «rechts» oder «links», immer im Verhältnis zu einem nicht zwingend mit adressierten «Dritten» (was eine neutrale «Mitte» sein kann oder einfach eine bestimmte Position auf dem Spektrum zwischen zwei angenommenen Extremen) – nehmen an-

dere zeitlich determinierte Begriffe in den Mund. Wer das tut, bezeichnet jemanden oder etwas als (eher) «konservativ» oder (eher) «progressiv» – und impliziert damit eine Bewegung, die von einer (je nachdem zu verteidigenden oder aber mit Bedacht zu verwerfenden) Vergangenheit in eine (je nachdem zu fürchtende oder eben Besseres verheissende) Zukunft führt.

Da Sprache bekanntermassen den Fokus auf bestimmte Realitätsausschnitte richtet und damit massgeblich beeinflusst, welches Licht beim Interpretieren auf den besagten Ausschnitt fällt, ist die unterschiedliche Wortwahl in solchen Diskursen nicht trivial.

Denn das Selbstbekenntnis zur «Mitte» hat im ersten «rechts/links-Fall» einen versöhnlichen Klang: Wenn doch die soziale Realität als solche gar nicht mal als so übel wahrgenommen wird und grundsätzlich ein solides Fundament für (moderate oder allenfalls weiter reichende) Veränderungen abgibt, lassen sich aus der idealen Mitte heraus die Verhandlungen zwischen divergierenden Positionen mit der Aura des neutralen Mediators führen.

Ganz anders die Verhältnisse im zweiten «konservativ/progressiv-Fall», der in der Regel von expliziten historischen Überlegungen und Bezügen geprägt ist. Die Debatte lässt sich hier nicht von den (Vor-) Bedingungen eines mit zur Debatte stehenden Ist-Zustandes abstrahieren. Denn dieser Ist-Zustand steht als solcher im Zentrum der Diskussion, und zwar, genau, in seinem Potenzial zur Stabilität, aber auch zur Mobilität (was beides wiederum mit positiven wie negativen Vorzeichen versehen werden kann, im Sinne eines zu beobachtenden interessanten «Phänomens» oder aber dringend zu behebenden «Problems»).



Vereinfacht gesagt haben wir es im ersten «rechts/links-Fall» mit einer paradigmatischen Zugangsweise und entsprechend festgefühten, unveränderlichen Positionen zu tun, die wie in einem Schachspiel mit den immer gleichen Werten und Motivationen ausgestattet sind und quasi «ewig währen». Im zweiten «konservativ/progressiv-Fall» aber besteht eine syntagmatische Sicht auf die Dinge, die Veränderung entweder scheut oder sucht – und deswegen nur im zwingend mitzudenkenden Kontext einer bestimmten historischen Situation bzw. Entwicklung wirklich funktioniert und Sinn macht.

Und noch ein Begriff steht zur Disposition, den man so oder so verstehen kann. Es ist der Begriff des öffentlichen Diskurses, der gemäss dem übergreifenden Reihentitel für den Band, der hier rezensiert wird, nicht nur auf dem Prüfstand steht, sondern kurz davor, seine Existenz als solche aufzugeben. Was ist hier gemeint? Wie ist dieser *Diskurs* zu verstehen, der – wie ich annehme, als prominentes Erbstück der Aufklärung und integrierender Bestandteil der Moderne, wie das Jürgen Habermas (1962) in seiner Habilitationsschrift zum «Strukturwandel der Öffentlichkeit» anschaulich dargelegt hat – dringend gerettet beziehungsweise vor drohender Gefahr bewahrt werden muss, weil es doch – wie es wiederum der Untertitel des Einführungsbandes aus der Reihe der «Schriften zur Rettung des öffentlichen Diskurses» deutsch und deutlich formuliert – dieses spezifischen Diskurses als Destillat bzw. *Essenz der Demokratie* nach wie vor bedarf?

Und, nochmals weitergedacht: Was hat eigentlich dieser (aufklärerische, moderne) öffentliche Diskurs mit dem Thema des Bandes zu tun, dessen Titel programmatisch «Streitlust und Streitkunst» lautet? Ist ein *Diskurs* dasselbe wie eine *Debatte* – und wird also in diskursiven Auseinandersetzungen notwendigerweise (mehr oder weniger lustvoll und gekonnt) *gestritten*?

Das Leitmotiv von Schriftenreihe und Anthologie

Diese Fragen sind deshalb zu stellen, weil die von Russ-Mohl herausgegebene Anthologie genauso wie die zugrundeliegende Schriftenreihe mit ihren derzeit sechs Bänden für sich in Anspruch nimmt, zwar nicht Anweisungen, aber doch pragmatisch formulierte Hinweise zu geben, wie sich «Diskursfähigkeit zurückgewinnen» lässt, wie es im Vorwort des hier zur Debatte stehenden Bandes heisst. Gerettet werden soll also eine «zivilgesellschaftliche Streitlust und -kunst», die im Ton zwar konzilient, aber in der Sache «hart und problemlösungsorientiert» agieren soll. Und die entsprechende Zielformulierung lautet, es sei ein «engagiertes, um Rationalität bemühtes Ringen um Kompromisse wiederzubeleben» – und das nicht bloss in den öffentlichen Medien (womit Massenmedien ebenso wie die digital zugänglichen Plattformen der kommerziell orientierten *Social Media* gemeint sind), sondern mit Vorteil auch in der politischen Arena selber – was ich jetzt einmal etwas salopp mit «Flügelkämpfen zwischen rot und schwarz» zu übersetzen geneigt bin. Diese Auseinandersetzungen also sollen statt, wie bekanntermassen in der Aufmerksamkeitsökonomie üblich, auf Dissens bzw. auf ein stures Festhalten an einmal eingenommenen Positionen, vermehrt wieder auf ein Geben und Nehmen und damit auf eine kooperative Konsensfindung im Sinn der eingangs erwähnten «Orientierung an der Mitte» ausgerichtet sein.

Damit komme ich auf meine Frage zurück: Wovor die Diskurse im Einzelnen zu retten sind, wird im Vorwort des Herausgebers zu der Anthologie näher erläutert: Es geht da um die Irrationalität eines vom Gruppendruck bestimmten Denkens (in Anlehnung an Irving L. Janis Begriff des *group think*), um chronische Reizüberflutung und Überinformation, um die Emotionalisierung krisenhafter Ereignisse (am Beispiel der Corona-Berichterstattung) und um den unterstellten Rückzug breiter Bevölkerungsschichten in zwar vor Glaubenszweifeln «sichere», aber auch denkbar eng geführte, weil mit blick-

dichten Scheuklappen ausgestattete Meinungs- bzw. Filterblasen.

Es ist sicher zu begrüßen, dass die Beiträge in dem Sammelband – ebenso übrigens wie die weiteren bisher erschienenen, monothematischen Bände der Schriftenreihe – trotz solcher programmatischer Äusserungen keinem explizit vorgegebenen verlegerischen Konzept unterworfen sind und entsprechend heterogen in der Ausrichtung bleiben dürfen. Und zwar deshalb, weil die von Russ-Mohl angeschnittenen Risiken und Gefahren das breite Feld der gegenwärtigen Veränderungen mit allen nachhaltigen Implikationen für das, was man eine anstehende «Erneuerung des Sozialvertrags» nennen könnte, nicht annähernd abdecken. Und eben auch, weil nicht alles, was auf den ersten Blick eine Gefahr für Liebgewordenes darstellt, nur in seiner dysfunktionalen Lesart wirkungs- und bedeutungsvoll werden dürfte: Es kommt da immer auch auf den Standpunkt an. Und darauf, wo man hinwill.

Zu den einzelnen Beiträgen

Gleich zu Beginn wird die Frage nach der Digitalisierung als «Diskurskiller» gestellt – und von Ulrike Klinger und Christian P. Hoffmann in je eigenen Beiträgen durchaus differenziert beantwortet. Wenn sich derzeit in der öffentlichen Meinung eine Art «Techlash» breit mache, im Sinne einer dystopischen Sicht auf die Diskurskompetenz in den sozialen Medien, sei das auch als Erscheinungsform der sogenannten *moral panic* deutbar, meint Hoffmann – und damit durchaus mit Vorsicht zu genießen. Georg Franck stellt die Frage nach den ökonomischen Grundlagen dessen, was schon Habermas als «Forum» (mit dem Vorbild der antiken *αγορά*) und gleichzeitig als Marktplatz von Meinungen bezeichnet hat, während sich Bernhard Pörksen kritisch mit dem «Polarisierungsschub» auseinandersetzt, der Phänomene wie den vormalig lediglich in randständigen Nischen beheimatete «Lügenpresseverdacht», aber auch Verschwörungstheorien in die Mitte der gesellschaftlichen

Aufmerksamkeit befördert hat. Pörksen kommt im Schluss seines Beitrags der impliziten Aufforderung nach, Rettungsideen zu skizzieren, und entwickelt das spannende Projekt eines wirklich dialogischen Journalismus, der das Publikum nicht nur als Stichwortgeber und «Newsscout» sieht, sondern als ebenbürtigen Partner im Ringen um Faktentreue und Regelwerke für den Umgang mit Meinungen (z. B. in Kommentaren und Kommentarspalten).

Während in der Betrachtung der «Klimadebatte» (ähnlich wie im Vorwort zur «Coronadebatte») kritische Stimmen hinsichtlich einer fast schon autoritär ausgeübten Meinungsführerschaft durch wissenschaftliche «Experten» überwiegen, dreht Michael Haller am Beispiel der «Flüchtlingsdebatte» das Rad weiter und stellt die Systemfrage nach Funktion und Dysfunktion von Medienberichterstattung generell – gefolgt von Sandra Kostner, die im Anschluss daran die Handlungsfrage stellt, hinsichtlich der Rolle von Leitmedien als moralischer Instanz. Im Fokus der Beiträge stehen im weiteren Rechts- und Linksextremismus ebenso wie die (verbindende oder trennende?) Rolle des öffentlich-rechtlichen Rundfunks und die im Qualitätsjournalismus anzusetzenden Massstäbe. Dass gegen Ende des Bandes prominent die Auslandsberichterstattung im Fokus steht (mit den Beispielen Italien, Israel und Türkei), verweist auf den wichtigen Umstand, dass die Arenen der öffentlichkeitsrelevanten Dialoge, Dispute und Debatten immer schon international vernetzte waren, womit auch national unterschiedliche Gesprächs- und Meinungskulturen genauso wie unterschiedliche Demokratieverständnisse ins Bild geraten müssen. Wie damit umzugehen ist, war also immer schon eine Herausforderung – und diese Herausforderung ist angesichts der programmatischen «Sprachverweigerung» durch autoritäre Potentaten, die die öffentlichen Medien lediglich in ihren obrigkeitfreundlichen PR-Funktionen gutzuheissen bereit sind, auch jetzt nicht leichter geworden.

Indem der Sammelband hier ein «breites Spektrum von Positionen präsentiert» (wobei in Einzelfällen auch mal zur direkten Gegenrede auf vorangehende

Überlegungen angesetzt wird), soll also Streitkultur – im Sinne von Lust wie auch als Kunst bzw. Diskurskompetenz – gerade nicht auf bestimmte Lehrmeinungen mit je eigenen Spielregeln eingegrenzt werden, sondern sich frei entfalten und in den Anschlussüberlegungen der Leserschaft divergent nachhallen.

Ein Seitenblick auf den Band 6 der Reihe: «Rettet die Nachrichten»

Diese grundsätzliche Denkfreiheit zeichnet auch den zuletzt erschienenen Band 6 der Reihe aus («Rettet die Nachrichten» von Marco Bertolaso), wo gerade nicht auf eine möglicherweise idealisierte Leitmedien-Vergangenheit mitsamt übergeordneten gesellschaftlichen Objektivierungs- bzw. Orientierungsfunktionen verwiesen wird, sondern schlicht auf die Notwendigkeit, den rasanten sozialen Wandel in Zeiten der Krise adäquat zu begleiten, mit Respekt gegenüber den jeweiligen Akteur*innen, aber auch mit selbstkritischer Demut und, nach Möglichkeit, Transparenz hinsichtlich der im Nachrichtengeschäft *per default* herrschenden Abhängigkeiten und Routinen, blinden Flecken und anderen systemischen Überforderungen. Es brauche nämlich, so Bertolaso auf der Website zum Buch (<https://www.halem-verlag.de/rettet-die-nachrichten/>), einen Neuanfang auf ganz vielen Ebenen: «Redaktionen müssen sich hinterfragen, aus Fehlern lernen und ihre Arbeit öffentlich zur Diskussion stellen. Unser Handwerk muss Regeln nachjustieren und sich von manchen Gewohnheiten verabschieden.» Vor allem aber brauche es eine breit abgestützte gesellschaftliche Wertschätzung für das Leistungsvermögen (und, nicht zu vergessen, die Leistungsgrenzen) eines unabhängigen, professionalisierten Nachrichtenjournalismus, um dem entsprechenden Berufsfeld und seinen institutionellen Leistungsträgern die notwendige Existenzgrundlage auch und gerade in turbulenten Zeiten zu sichern.

Streitlust oder Streitunlust? Das Beispiel der gendergerechten Sprache

Angesichts dieser differenzierten Überlegungen fällt dann aber doch auf, was sich in dem aktuell besprochenen Band zur «Streitlust und Streitkunst» sehr wohl im Widerspruch zur behaupteten Offenheit der Reihe lesen lässt: Es ist die – nur halbwegs augenzwinkernd zu verstehende – Selbstbezeichnung des Herausgebers als *alter weisser Mann*, der sich «Gendersternchen und andere modische Schreibweisen zur Geschlechterdifferenzierung, die sich der deutschen Grammatik nicht fügen» ausdrücklich verbittet, weil sie, wie er schreibt, den Journalismus wichtiger sprachlicher Differenzierungs- und Ausdrucksmöglichkeiten beraube (S. 45).

Über solche Annahmen liesse sich nun allerdings trefflich streiten und mit sportlichem Ehrgeiz so manche Klinge kreuzen. Und zwar, weil sich genau am Punkt der *gendergerechten Sprache*, die eine Vielfalt von möglichen Alternativen zum bisher vorherrschenden «generischen Maskulinum» ausdifferenziert, so vieles, was sich die Schriftenreihe vornimmt, programmatisch aufzeigen und hinsichtlich ihrer (nicht nur) journalistischen Praxistauglichkeit überprüfen liesse. Und zwar bis hin zur Frage, wer sich dem öffentlichen Diskurs über gesellschaftlichen Veränderungswillen und zeitlich wie räumlich determinierte Grenzen der Akzeptanz unter welchen noch abzuklärenden Prämissen aktuell auszusetzen bereit ist und wer eher nicht.

Zweifellos ist der Bedarf an Auseinandersetzung hier wie auch bei vielen anderen Fragen der Sichtbarmachung ungleicher Spiesse im aktuellen öffentlichen Diskurs gegeben, und zwar so lange, wie dieser öffentliche Diskurs ein von überkommenen Traditionen und Hierarchiegefallen *nach wie vor* geprägter ist. Und damit wiederum verbinden lässt sich die Hoffnung auf zukünftige Streitgespräche, die so lustbetont, kunstfertig und gleichzeitig Ausdruck eines respektvollen «Miteinanderredens» sind (nach Pörksen & Schulz von Thun, 2018), wie es sich der Herausgeber und der Verlag im Fall der

vorliegenden Schriftenreihe explizit wünschen.

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