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INTERCULTURAL MEDIATION, CITIZENSHIP AND SOCIAL DEVELOPMENT
MEDIAÇÃO INTERCULTURAL, CIDADANIA E DESENVOLVIMENTO SOCIAL

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From Emergence and Transformation: Aligning Points, Opening Channels

Entre a Emergência e a Transformação: Unindo Pontos, Tecendo Laços

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In the last 3 years, particularly, thinking about contemporary societies necessarily includes resorting to the various sensory experiences: what we observe, hear, feel, and do. We live in times of social crisis and emergency contexts due to the global COVID-19 pandemic situation. This phenomenon extended to all continents and populations and uncovered the strengths and fragilities of globalisation and the geographical, economic, and social interdependence of continents, countries, institutions, and people. Moreover, we have witnessed in shock the outbreak of war and the steep escalation of aggression in distant countries and on other continents, but close enough to think about the reliable defence of European values and freedom. In light of the visible manifestations of confrontation, deaths and verbal and physical war, as well as of the east-west dichotomy, it is important to recognise the importance of dialogue and mediation to promote world peace.

We have all been affected by the situation to different levels and degrees of intensity. We are more aware of the experience of fragility. Relationships are being reanalysed to reveal gaps of social distancing, loneliness, and processes of reinvention. The most vulnerable populations (at social, economic, demographic, and cultural levels) have become more exposed to risks. That is particularly the case for the elderly who live alone, the migrants and refugees, the children, and precarious workers. Multicultural contexts have undoubtedly become more visible. They have triggered intense questioning of the notion and experience of citizenship; they have continued to put pressure on social life and community as we know them. Some references have probably lost meaning, and some have progressively invaded our realities and imaginaries. The "state of emergency" we live in is complex at various levels. It includes prophylactic isolation, the physical distancing of people, psychic, physical and social violence, and increased vulnerabilities and inequalities of more fragile and marginalised populations.

It makes sense to evoke the metaphor "between totality and infinity", which Martins (2019) uses to think and analyse the "refugee crisis" in Europe. In his argument, he turns to Euclid to resume the geometric object "point" by stating

> for me, this geometric figure, an alignment of discontinuous, intermittent points, is a metaphor of contemporary life, which rather than being a line indicating a sure foundation, a known territory and a stable identity, is above all an alignment of inconstant points, across space. But by drawing the lines and aligning the points, we can trace physical and tactile strings. Lines, such as points aligned in a straight line, can thus be taut strings, shelters against abandonment, impersonality and isolation. (Martins, 2019, p. 31)

Interestingly, or perhaps not, we perceive this metaphor as increasingly up to date and pertinent. It is present in the density of the days that pass and in our simultaneously perplexed, expectant imaginary, which is confident in the alignment of points and in the straight lines that can weave taut and strong strings. It is with this perplexity and confidence, we dare to speak of the requisites of mediation and citizenship deemed fundamental to social and human development. Daring and perseverance are essential to permanently (re)building the broken bridges and (re)aligning scattered points.

Mediation is the constructive communication procedure for the prevention and positive management of conflicts, producing transformative dialogues, and strengthening social ties (Silva, 2018). To convene and to generate transformative intercultural dialogues are two essential actions that deconstruct borders (Silva et al., 2019) and uncover unexpected, creative, and innovative exits in times of change like the ones we describe. Another fundamental aspiration is to stimulate the analysis of plural and multifaceted objectives in contexts of great social transformation. That can be achieved by using practices of intercultural mediation that support multicultural citizenship and the positive development of society. They are transformative and "regenerative" in a humanist logic of care for the other and building possibilities for the reinterpretation of society in crisis contexts. Defining preconditions for successful transfer and possible ways of overcoming potential barriers can guarantee the effectiveness of the whole transformative process.

Technological, cultural and social transformations introduced profound changes in social structures and in the organisation of human communities. They opened up room for questioning the notion of citizenship and its further exploration of recognition at various levels, such as sexual, racial, ethnic, diasporic, ecological, technological and cosmopolitan diversity and difference (Martins et al., 2017, p. 7).

Several questions can be asked in the face of the challenges raised by societies transformed by social, cultural and identity crises:

- What is the impact felt on social and territorial cohesion and on how each individual, group or community thinks about citizenship and their activity as citizens?
- How are emerging spaces of security and interculturality created? Where do they emerge?
- Which cultural and social interventions make the most sense?
- How do emerging (emotional, physical, digital, etc.) mediation spaces, both conventional and unconventional (i.e., ethical, aesthetic, pedagogical, social), appear and how are they nurtured?
- How have plural identities and multicultural and intercultural communities been restructured? How did people reimagine the sense of belonging to a plural and diverse social space during and after the pandemic?

- How does the social crisis and health emergency pandemic affect the work of intercultural mediators in their various spheres of social, cultural and educational activity?

This issue of the *Lusophone Journal of Cultural Studies* brings together contributions to these themes. Several issues are discussed, and real and potential weaknesses are identified and debated. They inventory the possibilities and creative deviations to social and human disturbance situations experienced in recent years in various geographical, social and human territories. Under the theme of "intercultural mediation, citizenship and social development", the seven articles included in the thematic section of this issue are expected to broaden readers' horizons and challenge them to imagine healthier, more intercultural and more inclusive forms of living. They offer reflections on the possibilities of cultural and social interventions in pandemic and post-pandemic times, dialogue and intercultural mediation, and citizenship and social development in diverse contexts and from multiple perspectives.

Patricio Dugnani, in "Extended Body Versus Intercultural Body: Reflections on the Use of the Media and Interculturality", enquires into the following: can the digital media expand the reach of the nervous system? How can the theories of perception be extended, and what is the new organisation of intercultural society? What is the new intercultural paradigm, and what communication strategies are necessary to develop in the globalising world? These topics are reflected and analysed, hypotheses are given, and arguments are presented to open up possible ways to rescue otherness and modern society from its disappearance. The author also summarises three key skills that need to be strongly developed to enable harmonious relationships among individuals and the effective democratic functioning of future intercultural societies and institutions.

Gamification as a motivating tool in teaching and learning has been widely discussed. The article "The Plurilingual *Kamishibai*: Its Potential in Education for Cultural Diversity", by Francisco Rocha and Rosa Maria Faneca, focuses on the opening of school culture to different cultures, lifestyles, as well as formats and techniques in order to understand others, thought patterns, values and norms other than those we are used to. It discusses the potential of storytelling through handmade picture dramas that originally date back to the Japanese Buddhist temples of the 12th century and may bring educators fresh inspiration, cultural richness, and new instruments that facilitate dialogue and inclusion at schools. In addition, it considers the limitations, resources and the overall contribution of the plurilingual *kamishibai* to the development of intercultural competence in primary school education. The implementation of practical steps and their effectiveness is described, and the impact on children's self-development, communication and thinking skills is analysed.

In "The Film *Ilha da Cova da Moura*, the Media and the Permanence of Racism in Society", Isabel Macedo exposes the role of the media in shaping young people's minds and in encouraging either stereotypical representation or their deconstruction. Through the analysis of the film *Ilha da Cova da Moura* (Island of Cova da Moura), directed by Rui Simões, the author analyses and discusses the message of the film, namely the role of

associations, the idea of belonging and agency to/in the community and the social stereotypes and racial discrimination experienced by inhabitants of a peripheral neighbourhood of Lisbon.

In the following text, "The Accidental 'Age-Friendly City': Public Expectation and Subjective Experience in São Paulo", authors Marília Duque and Adriana Lima de Oliveira present an experience in São Paulo, which they call "accidental age-friendly city". Based on the demographic characterisation of contemporary societies, their ageing patterns and public policies oriented towards active ageing, they address the movement between public expectations of innovative measures, such as those related to smart cities and age-friendly cities, with the subjective and objective experiences of the elderly given what is available and how they can access it. The experience they describe discusses what the digital and social inclusion of the elderly amounts to and highlights the interaction and support networks created accidentally by groups of elderly through the use of WhatsApp.

In "Changing Perspectives: The Role of Creative Industries in Social Innovation Projects to Empower Local Communities", Ana Margarida Cruz Silva and Clara Maria Laranjeira Sarmento e Santos approach the changing perspectives through social innovation projects focusing on new opportunities for the cultural development of rural areas in central Portugal that appeared after the COVID-19 pandemic. The authors wish to demonstrate the role of the local communities that often need empowerment to be able to interact in the global environments with local cultures, thus creating an intercultural space which plays an inevitable role in our globalised world. A brief literature review also points out some social innovation concepts and sustainable strategies available and "glocal" trends affecting the development of creative industries and their impact on the local communities' functioning.

In the text "'Where's the Museum?' Reflections on the Impact of the Pandemic on Cultural Spaces and Deaf Museum Educators", Maria Izabel dos Santos Garcia, Rebeca Garcia Cabral and Bruno Ramos da Silva discuss the inclusion of deaf people and their access to culture. The authors reflect on the importance of being granted access to culture, particularly museums, affected and suspended by the COVID-19 pandemic in Brazil. This context was particularly hurtful for deaf people. Therefore concrete proposals are put forward to reinvent museums to provide deaf people with conditions of inclusion and access to culture, namely by giving relevance to the presence of deaf culture mediators to facilitate communication and inclusion.

Finally, "Risk Tourism Within Viral Society: A Study Using Hybrid Discourse Analysis" by Pedro de Andrade brings up new insights into emerging hybrid social processes and the notions of viral society, viral risk tourism and the alphabet of inter-conceptual relations, including a valuable glossary of the recently established terminology from the areas of urban tourism and hybrid discourse analysis. Primarily, it focuses on transforming our social formations due to the COVID-19 pandemic, then it interprets and evaluates the information published through the digital social network Wikipedia and lastly it analyses the supportive arguments in theoretical and practical contexts.

The Varia section includes four important contributions. Berta García-Orosa presents us with an analysis of the digital political communication strategies of 25 political parties from five Lusophone countries. The author verifies existing trends from previous studies, such as innovation in digital narratives, the use of various platforms and the involvement in communicative interaction. New trends are also identified, among them the use of instant messaging, the podcast and the implication of neutralising fake news.

Carlos Alberto de Carvalho then brings us a conceptual and methodological reflection on communication, journalism and gender relations, highlighting how potentially disruptive the social dynamics of gender relations are. To this end, he explores research on the news coverage of physical and symbolic violence against women, events involving homophobia and its consequences, and reflects on the first public pieces of news on acquired immunodeficiency syndrome.

The Varia section also incorporates a comparative study that analyses the media debates on the agrarian reform undertaken in Spain from 1932 to 1936 and in 1964 in Brazil. Camila Garcia Kieling and José Manuel Peláez Ropero analyse newspaper excerpts published by the monarchical newspaper *ABC* (Spain) and the newspaper *O Estado de S. Paulo* (Brazil). They explore the press's discourse on two important events that marked the 20th century: the attempted coup d'état, which started the Spanish Civil War in 1936 and the 1964 civil-military coup in Brazil.

Finally, Carlos Henrique Pinheiro and Elton Antunes offer us an analysis of two reportage books on recent disasters in Brazil: *Tragédia em Mariana* (Tragedy in Mariana), by Cristina Serra (2018); and *Brumadinho: A Engenharia de um Crime* (Brumadinho: The Engineering of a Crime), by Lucas Ragazzi and Murilo Rocha (2019). The authors explore the media approaches to these events from three analytical dimensions — indicators of listening and authorial presence; characters with(out) plot and design; and paratexts — to attempt to analyse how each author-reporter positions him/herself in the face of catastrophe and what kind of journalistic record is built.

The book *Rockonomics: A Backstage Tour of What the Music Industry Can Teach Us About Economics and Life*, by Alan B. Krueger, in which the author uses the music industry to explain the principles of economics and the forces that shape our economic life, is the subject of a review by Daniel Morgado Sampaio. This review closes this issue of the *Lusophone Journal of Cultural Studies*.

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Thematic articles | *Artigos temáticos*

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Extended Body Versus Intercultural Body: Reflections on the Use of the Media and Interculturality

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Abstract

This article seeks to reflect on the relationship between the extension of perception, predicted by Marshall McLuhan's media theory (1964/2016), and the organization of an intercultural society, based on the studies of authors such as Maria Aparecida Ferrari (2015), Lisette Weissmann (2018) and Natalia Ramos (2013). Starting from the concept of extension, as stated by McLuhan, that the media can expand the reach of the nervous system itself, it is intended to think of this extension of perception as a virtualized extension of the human body itself. Taking this premise, we seek to understand the consequences of this phenomenon in the constitution of a globalized culture. In other words, it seeks to answer the following question: is it enough for the body to be extended virtually by digital media to constitute a globalized and ethical society, or would an intercultural communication strategy be necessary for this to occur? Thus, it starts from the hypothesis that it is not enough for the body to be virtually extended by the media to organize itself as a globalized culture, but that an intercultural communication strategy would be necessary to develop a globalized culture, where exchanges information are balanced, and to develop an ethical relationship between different cultures. This reflection intends to prevent the globalized relationship between cultures from becoming another way of imposing ethnocentric cultural models. Therefore, it is believed that it is necessary to develop a globalized society that respects different cultures more than a body expanded by the media. In this way, it becomes necessary to develop an intercultural body so that it is possible to rescue otherness and society from its disappearance.

Keywords

media, extension, interculturality

Corpo Estendido Versus Corpo Intercultural: Reflexões Sobre o Uso dos Meios de Comunicação e a Interculturalidade

Resumo

Esse artigo busca refletir sobre a relação entre a extensão da percepção, prevista pela teoria dos meios de Marshall McLuhan (1964/2016), e a organização de uma sociedade intercultural, baseada nos estudos de autoras como Maria Aparecida Ferrari (2015), Lisette Weissmann (2018) e Natália Ramos (2013). Partindo do conceito de extensão, como afirma McLuhan, de que os meios de comunicação são capazes de ampliar o alcance do próprio sistema nervoso, pretende-se pensar nessa extensão da percepção como uma extensão virtualizada do próprio corpo humano. Tomando essa premissa, busca-se entender quais as consequências desse fenômeno em relação à constituição de uma cultura globalizada. Ou seja, busca-se responder à seguinte

questão: basta o corpo ser estendido virtualmente pelos meios digitais para se constituir uma sociedade globalizada e ética, ou seria necessária uma estratégia de comunicação intercultural para que isso ocorra? Dessa forma, parte-se da hipótese de que não basta o corpo estar estendido virtualmente pelos meios de comunicação para se organizar como uma cultura globalizada, mas sim que seria necessária uma estratégia de comunicação intercultural para desenvolver uma cultura globalizada, onde as trocas de informação sejam equilibradas, e para que se desenvolva uma relação ética entre as diferentes culturas. Essa reflexão tem o propósito de evitar que a relação globalizada entre as culturas se transforme em mais uma maneira de imposição de modelos culturais etnocêntricos. Por isso, acredita-se que é preciso desenvolver uma sociedade globalizada que respeite as diferentes culturas, mais do que um corpo expandido pelos meios de comunicação. Dessa forma, torna-se necessário desenvolver um corpo intercultural, para que seja possível resgatar a alteridade da sua falência, bem como, a própria sociedade.

Palavras-chave
meios de comunicação, extensão, interculturalidade

1. Introduction

The development of lenses made it possible to reveal dimensions previously unknown to humanity: a microworld and a macro world. Telescopes revealed to the eyes of astronomers the organization of the orbits of planets: the macro world. Microscopes revealed the universe of microorganisms — bacteria, protozoa, among others — which revolutionized medicine and the treatment and prevention of diseases. The media have this potential: besides transmitting information, for Marshall McLuhan (1964/2016), they are extensions of human perception, extensions of the nervous system itself. Furthermore, for the Canadian author, the media and information change society and individuals' behavior and consciousness, both of society and individuals. Therefore, the media are pure information. They are messages.

> During the mechanical ages we project our bodies into space. Today, after more than a century of electrical technology, we have engineered our own central nervous system into a global embrace, abolishing time and space (at least as far as our planet is concerned). We are rapidly approaching the final phase of the extensions of man: the technological simulation of consciousness, through which the creative process of knowledge will be collectively and corporately extended to the whole of human society, as has already been done with our senses and our nerves through the various means and vehicles. (McLuhan, 1964/2016, p. 17)

McLuhan's (1964/2016) view on the media revolutionized communication theories, inaugurating a new line of research, media theory. Starting from the understanding that the media, more than transmitters, are human extensions, the need arises to study the relationship between the use of the media and the vision of interculturality in the formation of a society in order to develop respect for the multiplicity of cultures that make up different human groups.

The extension of human senses unfolds as an extension of the individual's own human body and, consequently, of the social body of a community. Hence, the extension promoted by the media ends up extending the individual's body, as well as the body of society itself.

Through this initial reflection, this article aims to observe the relationship between the extension of human perception, predicted by McLuhan's media theory (1964/2016), and the organization of intercultural relations in a globalized communication environment mediated by the use of media, digital communication, the internet, and social networks. Starting from the concept of extension, which predicts, as the author states, that the media can expand the reach of the human nervous system itself, one might consider the extension of perception as a virtualized extension of the individual's human body and of society itself.

To understand the relationship between media use and social transformations, we will draw on concepts from McLuhan's (1964/2016) media theories; to analyze intercultural communication and the organization of a global society, we will refer to the studies of Maria Aparecida Ferrari (2015), Lisette Weissmann (2018) and Natália Ramos (2013).

Based on this premise that the use of the media, especially digital media, produces an extension of perception in human beings and the virtualized body itself, we seek to understand the consequences of this phenomenon. However, that is a very broad subject. In this article, the relationship between the effects of digital media and the extension of the virtualized body will focus on the need for an intercultural communication strategy to efficiently develop this extension of the senses through digital media and establish a global culture. In other words, this article seeks to answer the following question: is it enough for the body to be extended virtually through digital media to constitute a globalized and ethical society, or would an intercultural communication strategy be necessary for this to occur?

Thus, in this article, we assume that it is not enough for the body to be virtually extended by the digital media to organize a globalized culture efficiently. Rather, developing a globalized culture, where the exchange of information is even, and an ethical relationship between different cultures requires a strategy of intercultural communication.

> In today's open and plural world, with globalization and the new means and technologies of information and communication, with the media, the internet, travel facilities and fast means of transport, cultural diversity, the Other, ethnic minorities have another status and image. Cultural diversity and the Other are not far away, but they are closer and present in everyday life, they cohabit with us in public spaces, in institutions, and claim respect and rights. (Ramos, 2013, p. 348)

This action aims to prevent the globalized relationship between cultures, mediated by digital media, from becoming an additional imposition of hegemonic and ethnocentric

cultural models, similar to previous civilizing processes, either through colonization in the past, or more recently, through the use of mass media, as in the 20th century.

Developing a globalized society that respects different cultures is deemed necessary for all those reasons. More than a body expanded by the media, it is essential to develop an intercultural body to rescue the otherness of its disappearance, as described by Byung-Chul Han (2010/2015) and to avoid the fragmentation and polarization of society, as described by Norval Baitello (2015).

2. Extended Body or Extension Through Means

The current polarization and fragmentation of society, mediated by the use of digital media, and perceptible, mainly in the truculent debates on social networks, seems to be contradictory to the positive, and perhaps utopian, perception of the unification of a global village advocated by McLuhan's media theory (1964/2016).

McLuhan (1964/2016) believed that, by extending the perception that the media produced in the sensitive human constitution, global society would become closer and develop collective relationships that would resemble the social organization of a tribe, creating, in short, a society of common and collective interests, that is, a globalized tribe: the global village. The researcher called this phenomenon "tribalization".

> The global village is a consequence of the extent of human perception and the changes it produces in human behavior. From the invention of electrical means, there was an increase in contact between cultures, and this expansion produces an effect of information exchange and, consequently, a uniformization of cultures, a phenomenon that the author believes will produce the global village. A term that seems antagonistic, as it refers to the global contact of cultures, which come closer together living more closely, such as the relationships of individuals who make up a small tribe. Therefore, for McLuhan (1996), the new electric media, later the mass media, are retribalizing. From this conclusion, one can extend this phenomenon of retribalization through digital media. An example that can be given of this phenomenon in the new digital media are social networking sites, such as Facebook, Twitter, etc., where individuals come together in communities for common interests, and not only for reasons of spatial, legal, or national proximity. (Dugnani, 2018, p. 6)

Tribalization (or retribalization) is characterized by this process of bringing together different cultures in the same space that would merge through mediation, that is, through the use of the media. In short, the simple development and use of new media would create human groups with collective interests. This vision of McLuhan (1964/2016), I would add functionalist, seems questionable, given the increasingly common events of scattered cultures instead of mixed, as Baitello (2015) stated. The utopia of a global village

seems to have been replaced by a re-feudalization of virtualized communities, as Graham Murdock (2018) points out. Unification is being replaced by fragmentation and polarization, negating McLuhan's (1964/2016) vision. It seems that globalization boosted by the technological development of new media with global reach (such as electric media, mass media, and digital media) has run into a deglobalizing resistance, reflected in the protectionist and fragmentary ideology of contemporary political and social organization (Dugnani, 2018).

> Because of these protectionist signs and the closing of borders, which have been presented, more often, by the political proposals of nations, this article investigates the paradoxical movement of these policies, about the opposite movement of the digital media and the internet, which tend to pressure populations to expand contacts, increasingly globalized, given the high potential for reaching and extending the perception that these means are capable of producing in human relationships. Because of this question, a question seems to arise: is it possible that the apparent movement against globalization, or deglobalizing, will be able to resist the globalizing pressure of the media? (Dugnani, 2018, p. 2)

However, what did McLuhan (1964/2016) leave out when developing his concept of a global village?

Perhaps the researcher placed too much confidence in the technological development of the media, forgetting a fundamental aspect: the human being.

Both paradoxical processes of globalization and fragmentation that occur in hypermodern society (Lipovetsky & Serroy, 2014/2015; Rosa, 2005/2019) are mediated, or even reinforced, by the advent, mainly, of digital media. This fact cannot be denied. However, what is the reason for such a contradictory effect: to have a high unification potential, yet also a strong fragmentation effect?

In this article, the answer is that technological development is not enough to create a global society characterized by ethical relationships respecting differences. For this to occur, human beings must develop intercultural attitudes and communication so that it is possible to reach, one day, fair globalization, or, who knows, McLuhan's (1964/ 2016) idealized global village.

Therefore, it is not enough for the media to virtually extend human perception, that is, to prolong the human nervous system, as stated by McLuhan (1964/2016). It is essential to develop communication strategies so that through contact, the exchange of information between different cultures, mediated by digital media (through the internet or social networks), humans can develop an ethical awareness of the use of the media and respect for the cultural multiplicity of the diverse communities that spread across the world. Without this, all globalization will remain unfair, as stated by Milton Santos (2001), and the mixing of cultures will remain a multicultural process, as stated by Weissmann (2018), rather than intercultural. Instead of cultures mixing in a balanced,

intercultural way, an ethnocentric vision will maintain the same historical and multicultural dynamics of overlapping cultures.

Finally, the extension of the media, which would lead to a process of creating a global village, according to McLuhan (1964/2016), will only be possible, in the view of the author, if the process is developed by an intercultural communication strategy, because, if not, it will be doomed to repeat the same mistakes made by humanity in processes such as colonization in the Modern Age, or imperialism in contemporary times.

It is not enough to extend the senses and human perception. It is necessary to develop strategies that lead different cultures to know each other, understand each other, and, finally, learn to respect each other. In other words, just an extended body is not enough. An intercultural body is needed to create a globalized and ethical society, a true global village.

3. Intercultural Body: Challenges and Possibilities

The main tenet of this article is that we need both an extended body and an intercultural body to develop more ethical and balanced relationships in the globalization process. This is supported by observing the fragmentation produced by the digital media (Baitello, 2015) and perceived in the development of hypermodern society. After all, in hypermodern contemporaneity, we can observe the multiplication of perceived polarized relationships, both in virtualized contacts in social networks and digital media (theme of this article) and physical contact, due to the increase in migratory movements and the globalized contact of different cultures. "According to United Nations data, one out of every thirty-five people is an international migrant, which means that close to 200 million people today live outside their countries of origin, essentially migrating to the cities" (Ramos, 2009, p. 10).

Many researchers and political institutions are looking into this problem in search of solutions, and Ramos (2013) highlights in her text several entities and countries that have developed projects to analyze cultural relations in their territories, among them: the United Nations Educational, Scientific, and Cultural Organization, the Organization for Economic Co-operation and Development, the Council of Europe, the European Commission and High Commissioner for Immigration and Intercultural Dialogue.

> Intercultural diversity and the management of interculturality(ies) are the objects of concern of several international bodies, namely UNESCO, the OECD, the Council of Europe and the European Commission, and national bodies such as ACIDI (High Commissioner for Immigration and Intercultural Dialogue). They have developed various projects and initiatives to promote intercultural dialogue, constituting one of the most important fields of contemporaneity in the various scientific and interventional domains. Examples of these initiatives were the promotion by the European

> Commission and the Council of Europe, in 1997, of the *European Year against Racism and Xenophobia* and, in 2008, of the *European Year of Intercultural Dialogue* and the European *Intercultural Cities* Project. (Ramos, 2013, p. 345)

This concern can be observed, for example, in the studies carried out by Professor Natália Ramos, from the Center for the Study of Migration and Intercultural Relations of the Open University in Portugal: "Interculturalidade(s) e Mobilidade(s) no Espaço Europeu: Viver e Comunicar Entre Culturas" (Interculturality(ies) and Mobility(ies) in the European Space: Living and Communicating Between Cultures; Ramos, 2013) and "Diversidade Cultural, Educação e Comunicação Intercultural – Políticas e Estratégias de Promoção do Diálogo Intercultural" (Cultural Diversity, Education, and Intercultural Communication – Policies and Strategies to Promote Intercultural Dialogue; Ramos, 2009).

> The increase in globalization, migratory flows, and multiculturalism mean that States and different social bodies are faced with a great linguistic and cultural heterogeneity of their users, professionals, and citizens, which requires them to adopt practices, strategies, and adequate policies to meet this new social, cultural, educational, communicational and political reality. (...) Migratory flows have been increasing, reaching all continents and different sectors of public life, and by 2050, international migration is expected to reach 230 million. The number of international migrants has almost trebled since 1970. Regarding the European Union (EU), the number of migrants from non-European countries has increased by 75% since 1980. It is worth noting that close to 9% of the world's migrants are refugees, 16 million people (UNDP, 2004). In 2005 alone, migration flows in OECD countries increased by 11% compared to 2004. In these countries, flows of international students have also increased by more than 40% since 2000, as have flows of skilled workers (OECD, 2007). (Ramos, 2009, pp. 10–11)

Ramos (2009, 2013) presents data on this phenomenon of physical globalization through migration and proposes the need to develop new methods to face the problem. She also presents strategies developed in Europe to seek solutions to this issue, as analyzed by this article, both through the physical contact of migratory movements and through digital media' virtualized and globalizing contacts, mainly through the use of the internet and social networks. In this sense, agreeing with Ramos (2013), developing strategies and methods through communication and interculturality is necessary.

> These issues imply a new methodological and epistemological repositioning, a new paradigm in terms of research, training, and intervention in the field of intercultural relations. Interculturality(ies) pose numerous questions to practices, strategies, and policies related to the management of interculturality and communication, in particular intercultural communication, as well as the management of interactions between the Self and the Other, the

> negotiation of psychosocial processes inherent to intercultural encounters and to the negotiation of identities and conflicts. (Ramos, 2013, p. 344)

However, before presenting projects and strategies used to solve the problem created by the globalized encounters between cultures, it is essential to define what is meant by interculturality. For that, it is important to differentiate, agreeing with Ferrari (2015) and Weissmann (2018), two concepts: multiculturalism and interculturality.

This need to differentiate multiculturalism from interculturality, a frequent topic among researchers, is urgent, as the terms characterize two different and contradictory positions, which will affect the development of relations between different cultures. While multiculturalism is based on difference, recognition, and classification of multiple cultural identities, interculturality departs from and is guided from the notion of equality. It privileges not the classification of differences as the priority but emphasizes the need for contact and exchange of information between cultures, for the formation of a cultural synthesis that can reflect and mediate, in an ethical and balanced way, the contact between different cultures, communities, especially in a globalized environment, as presented in hypermodernity. Therefore, in this article, an intercultural vision is privileged, to the detriment of a multicultural stance.

> According to Lívia Barbosa and Letícia Veloso (2007), multiculturalism and interculturalism are two concepts worth differentiating. The authors argue that the notion of multiculturalism goes beyond identity politics, as it deals with issues of difference and identity under the umbrella of "recognition" of difference. This concept includes personal identities and broader themes such as multicultural politics, ethical dilemmas related to cultural and ethnic diversity, intercultural conflicts, and integration (individual and social) into new multicultural and transnational political communities. It also emphasizes the coexistence of several different ones within the same space and at the same time, without the need for interaction, with an interaction limited to the minimum necessary for the operation of everyday life or, still, limited to the public and legal dimension. Rodrigo Alsina (1997) understands multiculturalism as the coexistence of different cultures in the same real, media, or virtual space. Multiculturalism would mark the state, the situation of a plural society from the point of view of cultural communities in different identities. (...) The concept of interculturality, according to Barbosa and Veloso (2007), emphasizes the opposite: that "communication" between different people living in the same space at the same time is due to the need to establish common ground for communication and for the mutual understanding of what, in that particular context, should be the center of communication. (Ferrari, 2015, pp. 51–52)

Departing from both the concept of interculturality and an intercultural vision, it is now possible to reframe, through examples of intercultural communication strategies

presented by Ramos (2013), the central issue of this article: that it is not enough to create a globalized community, only a technological extension produced by the media, as advocated by McLuhan (1964/2016), but that it is necessary to develop intercultural awareness so that one balanced globalization emerges, based on respect between different cultures. In other words, an extended body is not enough, and an intercultural body is needed.

As an example, Ramos (2013) highlights the *Intercultural Cities* project, which aims to analyze immigration and cultural diversity in European countries and seeks to manage this phenomenon by developing strategies that render cultural diversity not a problem, but a factor of production, wealth, and collective well-being for the entire community.

> The European *Intercultural Cities* Project aims to analyze the impact of cultural diversity and migration in European cities, since more than 20 countries have at least 5% of inhabitants who were born abroad, and to develop strategies and policies capable of helping cities to turn diversity into a driver of development, enrichment and well-being for all. This project aims to manage cultural diversity in urban areas to make the city an open and a plural space and a privileged place for intercultural dialogue. (Ramos, 2013, p. 345)

Ramos (2013) further emphasizes the development of a new "intercultural paradigm" (p. 352), which will guide research on interculturality based on heterogeneity, plurality, discontinuity, multiplicity, complexity, intervention, multidisciplinarity, and interdisciplinarity. This new paradigm will seek to reposition research ethically and established by new epistemes and methods. This configuration should start from three structuring aspects: conceptual, methodological, and ethical.

> Globalization and the mobility of populations bring into contact a great diversity of cultures and identities, pose challenges to native and migrant populations and intercultural relations, and demand a new research and intervention paradigm, the so-called Intercultural Paradigm. This paradigm introduces plurality, heterogeneity, discontinuity, complexity, and multi/interdisciplinarity in research, training, and intervention, implying a new methodological, epistemological and ethical repositioning, based on three structuring aspects:
>
> *Conceptual* – Cultural differences are defined not as objective elements with a static character but as dynamic and interactive entities, which give each other meaning. The intercultural approach constitutes another way of analyzing cultural diversity, not based on cultures considered as independent and homogeneous entities, but based on processes and interactions;
>
> *Methodological* – The intercultural approach is defined as global, multidimensional, and interdisciplinary to account for the dynamics and complexity

> of social phenomena and avoid categorization processes. It is about the researcher/educator/intervener, acquiring familiarity with the social and cultural universe in which they work, understanding the representations that animate them, and reflectively questioning themselves not only about the culture of the other, but, also, and first of all, about their own culture;
>
> *Ethics* – The intercultural perspective has as an objective the knowledge of cultures, but, above all, the relationship between them and the Other, implying an attitude of decentration (Piaget,1970). It involves a reflection on how to respect individual, social and cultural diversity, reconcile the universal and the particular, the global and the local, and adapt to the structural complexity of a society and its conflict. (Ramos, 2013, p. 352)

Finally, Ramos (2013) also notes that to form this new "intercultural paradigm", it will be necessary to develop three sets of skills: individual, intercultural, and citizenship.

> - *Individual skills* that enable harmonious social interactions between individuals and cultures and promote an attitude of decentralization. Principles, models, and skills presented as unique and universal are abandoned and relativized to avoid many behaviors of intolerance and discrimination;
>
> – *intercultural skills*, especially linguistic, communicative, and pedagogical, that facilitate, on the one hand, intercultural communication and cultural awareness and, on the other hand, promote interculturally competent and inclusive practices and interventions, as well as culturally sensitive and involved professionals and citizens.
>
> - *citizenship skills*, which make the democratic functioning of societies and institutions possible. (Ramos, 2013, pp. 252–253)

From these three sets of skills, it is possible to highlight that the first (individual skills) develops harmonious relationships between individuals. The second (intercultural skills) is linked to the use of language, media, communication processes, and educational pedagogy in the sense of teaching strategies. The third (citizenship skills) relates to ethical and political issues, as these skills involve not only individuals but also social institutions in order to develop new paradigms for establishing an intercultural society. That is a society organized as a culture that respects the differences and complexities of the most diverse communities that make up the world's population. This globally organized society, which respects different cultures and makes up different human communities, is what the intercultural body represents. That is the direction that different communities are expected to take, mediated by the media: the development of intercultural relations.

Thus, by developing an intercultural body, it will be possible to create a society based on the interculturality vision. However, if human groups or individuals continue

to allow their meanings to be extended through the media, without reflecting on others and cultural multiplicity, the process of fragmentation in society, the weakening of alterity — denounced by Byung-Chul Han (2010/2015) —, and radicalizations will multiply. This could lead to the collapse of our concept of collectivity and society. Therefore, it is paramount to develop studies that relate the use of the media with the ideas and concepts of interculturality. In this way, it will be possible to seek a solution to a problem that increasingly produces misunderstanding, prejudice, and violence.

4. Final Considerations

To conclude this debate, it is worth noting that this article's premise about the relationship between an extended body and an intercultural body has been confirmed. It is now evident that a technological extension of human perception (an extended body), as in McLuhan (1964/2016), mediated by the media, is not enough to create a globalized community where the different cultures that form the world's human organization can live together with balance and ethics. The need to develop intercultural awareness (intercultural body) to foster balanced globalization based on respect among different cultures is reaffirmed. In other words, an extended body is not enough, and an intercultural body is needed.

Thus, developing fair globalization, as highlighted by Milton Santos (2001), or a global village, as referred by McLuhan (1964/2016), requires not only technological development but human development. In this way, it becomes essential to create strategies and skills that provide and enhance the process of approximation between cultures, mainly because this fact is inevitable, since, with all certainty, the advent of new means of communication will always have the effect of bringing people closer together, and mixing different cultures. After all, the advent of new means of communication always expands the reach of information exchange and extends human perception beyond the biological limits of the senses.

Therefore, alongside the technological development of the media, to develop balanced globalization that respects the diversity of cultures spread around the world, it is essential to analyze the processes of communication among cultures and the development of strategies that enable these contacts, not in a violent or biased way, but in an ethical way showing respect for human cultural multiplicity. Therefore, communication studies must join intercultural studies to create a path where different cultures can relate to each other, respecting their differences and joining efforts to produce well-being and, eventually, wealth for the human population. This action may prevent processes of fragmentation, polarization, prejudice between different cultures, creating a safe, fair, and egalitarian path towards constructing a global community that can live together collectively, as a tribe, as McLuhan (1964/2016) envisioned: a global village.

Translation: Patricio Dugnani

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The Plurilingual *Kamishibai*: Its Potential in Education for Cultural Diversity

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Abstract

The 1990s were marked by a set of socio-economic transformations which altered social dynamics, enhancing interconnection and interdependence, mobility, overcoming borders, reducing space and time, and the flow of information that opened new possibilities for access to cultural diversity. This set of perplexities challenges our time, requiring a renewed role for the school and the application of a new paradigm of identity and citizenship. It is important to develop a wide range of competences (skills, knowledge, and attitudes) that can allow greater interaction with people who are linguistically and culturally different from us. This contribution intends to discuss the benefits of promoting understanding and respect for cultural differences in educational contexts by using the plurilingual *kamishibai*.

Keywords

plurilingual *kamishibai*, multiculturalism, interculturality, intercultural education, learning

As Potencialidades do *Kamishibai* Plurilingue na Educação Para a Diversidade Cultural

Resumo

Os anos 90 ficaram assinalados por um conjunto de transformações de caráter socioeconómico, que alteraram as dinâmicas sociais, potenciando a interligação, a interdependência, a mobilidade, a superação de fronteiras, a redução do espaço e do tempo e o fluxo de informação, abrindo novas possibilidades de acesso à diversidade cultural. Todo este conjunto de perplexidades e de desafios marcam o nosso tempo e exigem um olhar renovado sobre o papel da escola e a aplicação de um novo paradigma de identidade e de cidadania. Daqui sobressai a importância do desenvolvimento de um leque alargado de competências (capacidades, conhecimentos e atitudes) que possam permitir uma maior interação com pessoas que são linguística e culturalmente diferentes. Com este contributo pretende-se aquilatar sobre os benefícios de promover a compreensão e a aceitação das diferenças culturais em contextos educativos através da utilização do *kamishibai* plurilingue.

Palavras-chave

kamishibai plurilingue, multiculturalismo, interculturalidade, educação intercultural, aprendizagens

1. Introduction

Innovative teaching and learning techniques have no limits in the educational community, which has always seen the introduction of pioneering strategies and forms of learning.

Involving students emotionally in the learning process has been noticeably essential for their deeper understanding (Fonseca, 2016). The introduction of the *kamishibai* ("paper theater") in education follows this trend. Its use is certainly an attempt to involve children, physically and emotionally, in the study of issues related to society, health, or well-being (Casas, 2006), and in this case, culture and interculturality. Questions around linguistic, cultural, and ethnic diversity, which the present reflection echoes, have become widespread. The main purpose of such questions is to demonstrate the importance of working on issues raised by cultural plurality at the school level, highlighting the problems and the reality associated with them (Beacco & Byram, 2007; Menken & García, 2010).

It seems consensual that ethnic-racial relations inexorably underline the daily life of modern societies, marking the dynamics of social relations, from which the school is not isolated. Considering the mechanisms of social transformation that education entails and the role played by teachers in the context of intercultural mediation, it would be important to probe the educational potential of the *kamishibai*, especially about the integration of diversity and dialogue at school, stimulating the construction of an environment conducive to solidarity, fraternity and mutual respect (Martins et al., 2017).

Based on the above considerations, a research project was set up at the Department of Education and Psychology of the University of Aveiro to understand a didactic tool recently introduced in Portugal — the plurilingual *kamishibai*.

This work aims to reflect on the benefits of promoting an understanding and appreciation for otherness in educational contexts using the plurilingual *kamishibai*. It thus produces knowledge about a didactic tool promoting a praxis that encourages the acquisition/development of intercultural competences (IC) at school.

2. Theoretical Framework

2.1. The Origins of *Kamishibai*

Kamishibai, a Japanese term that means "paper theater", is a millenary art form (initially with scrolls) used to tell stories. The practice allegedly originated in the ancient Buddhist temples of the 8th century, its main objective being reporting events to illiterate audiences, but with an eminently moralistic intention (Nash, 2009).

Although the early days of the *kamishibai* may be unknown[1], we can find references in journals to this art form around the 1930s as a street theater (*gaitô*[2]) practiced in neighbourhoods on the outskirts of Tokyo — *Shitamachi* (Nash, 2009). Apparently, the

[1] Japanese researchers came up with a wide range of possible historical precursors for *kamishibai*, ranging from scrolls of parchment with images — the *emaki* — to shadow theatre to mechanized puppet shows (*nozokikarakuri*).

[2] The *gaitō kamishibaiya* (itinerant storyteller) was just one of the many manifestations of popular theatre that flourished in Japan in the years leading up to World War II.

kamishibai finds its genesis in the *etoki* (pictographic explanation)[3] or the art of interpreting images, references to which can be found in *emaki* (painted roll) manuscripts of the 12th century, namely in the famous *Chōjū-jinbutsu-giga*, a set of four paintings exhibited in a Buddhist temple in Kyoto, authored by a Buddhist monk — Toba Sōjō (1053–1140).

The *emaki* or *emakimono* is a silk or paper illustration, arranged in rolls (*makimono*), dating back to the 8th century (Nara period), depicting, among other things, stories with fantastic animals (with human forms), great battles or novels.

Kamishibai as manga/*mangaka*[4] became particularly appreciated during the Japanese 1929 crisis and World War II. At this time, there was an explosion of *kamishibaiya* (outdoor storytellers) in Tokyo (about 2,500), who performed every day (several times) to an audience of several dozen children and were estimated to have involved about 1,000,000 people (McGowan, 2015).

That was one of the most fruitful and exciting eras in the history of the *kamishibai* in Japan, designated as the "golden age" of *kamishibai* (Orbaugh, 2015, p. 58). A strong publishing industry flourished around comics and, on its margins, driven by the search for cheap entertainment, there was also a great boom in *kamishibaiya*.

The *gaitô kamishibaiya* (itinerant storyteller) would stop their bicycles at familiar street corners and bang their *hiyogoshis* (pieces of wood) to announce their presence, thus starting the show, somewhat reminiscent of Molière's famous blows hit on the floor of the stage with a stick.

When the children gathered around, they would sell them sweets in return for admission to the show, which was their main source of income. The *kamishibaiya* used a *butai*, a small wooden stage, where they slid, one by one, as the story unfolded, the illustrated cardboard story cards (Moriki & Franca, 2017). The stories would always start with *mukashi mukashi*, meaning "once upon a time...", thus dramatizing the stories with great talent, using hand-painted coloured cards while producing sound effects that gave life and colour to their unscripted narratives — creating an atmosphere of suspense around them.

The *kamishibai* is a narrative technique that "combines text and image, theatricality and creativity" (Faneca, 2019, p. 361) and that stimulated Japanese society for decades, thus becoming a powerful and captivating way to illustrate stories[5].

Although the ancient art form of *kamishibai* has faded over time, its meaning and contribution allowed it to endure to the present day successfully[6].

2.2. The *Kamishibai* As an Educational Tool

The features of the *kamishibai* enable it, to this day, to be used in modern multimedia presentations for the most varied purposes (for example, in audits, engineering, and

[3] Japan has a long tradition of interpreting images.

[4] The Japanese name for "comic book". Outside Japan, this term refers to comic books produced in or under Japan's influence.

[5] The Japanese work *Genji Monogatari* (The Tales of Genji) was considered a masterpiece of Japanese literature. Written by Murasaki Shikibu in the early 11th century, it is generally regarded as the world's first novel.

[6] The International Kamishibai Association of Japan was created in 2001 to promote international appreciation and awareness of this art form. Most of its members are Japanese — over 700 — however, there are also members from all over the world.

production management); however, what makes the *kamishibai* especially useful for storytelling is its unique format. Large cards with colourful illustrations give the storyteller the opportunity to offer narratives with a strong visual component to the audience.

"The school of the future will perhaps not be a school as we understand it today - with seats, blackboards, and stage for teachers - it can be a theatre, a library, a museum, or a conversation" (Tolstoi, 1850/1988, p. 140). The providential tone of this statement, written more than 1 century ago, has now become a reality. Today, we find an increasing receptivity towards these ideas, with more means and resources dedicated to educating young people and children (International Kamishibai Association of Japan, 2019). One of those processes is precisely the theatre (Eisner, 1979).

The dramatic expression as a teaching tool is not something new. Historically, it has long been recognized as a medium with great potential for education and teaching (Courtney, 2003). In fact, only at the end of the 20th century was it possible to glimpse the real impact of this notion on public education. For many, it was questionable whether theatre and dance were an integral part of a young person's education (Spolin, 1978/2005) as indeed music, sports, and the visual arts.

Thus, this paper aims to show that the school has an essential role in promoting attitudes and values that form the basis of students' civic education — as a counterpoint to prejudice and discrimination (Martins et al., 2017).

2.3. The Plurilingual *Kamishibai*

Plurilingual *kamishibai* can be seen as an evolution of the traditional kamishibai when its pedagogical potential in linguistic and cultural terms is acknowledged.

In 1930, Imai Yone (1897–1968), a Japanese Christian missionary, developed a religious *kamishibai* that she used to teach the catechism to the children of her parish. She had noticed children's interest in traditional *kamishibai* stories and started adapting some biblical narratives to this resource (McGowan, 2015).

Impressed by Imai Yone's success, Gozan Takahashi (1888–1965), a publisher of children's magazines, created Zenkōsha, introducing the educational kamishibai. The publisher started publishing *kamishibai* stories based on Buddhist plays and Disney movies, for which he used different methods of illustration (Moriki & Franca, 2017). Imai Yone's technique, used for educational purposes, inspired several authors, including Matsunaga Ken'ya (1907–1996), who would go on to create "the type of interactive *kamishibai* that allows and fosters public participation" (Carreño, 2012, p. 5). In 1938, Gozan Takahashi also founded the Japanese Educational Kamishibai Federation to promote Japanese culture (Lucas, 2009). Since then, the *kamishibai* has often been used in public education institutions and libraries to stimulate teaching and learning and preserve the country's cultural heritage. From the 1970s onwards, it also became widely used as a didactic resource in Europe (Jiménez, 2005).

In 2015, the D'une Langue à L'Autre Association (From one Language to Another; based in Montreuil, France; https://www.dulala.fr/) held the first edition of a plurilingual

competition for collaborative writing and illustration of cardboard cards, that is, the construction of a plurilingual *kamishibai* (Pedley & Stevanato, 2018).

The versatility of the *kamishibai* form promotes communication and cooperation between children, from its creation to the moment of its presentation (Faneca, 2021). In this sense, it also enables various approaches, including linguistic and cultural activities, namely the integration of linguistic and cultural diversity. Thus, the *kamishibai* can be used to stimulate the personal and social development of children and support work across subject content areas and children's creative expressions. Consequently, developing these competences through the plurilingual *kamishibai* enables children to improve their intercultural communication and interaction.

> Due to its educational potential and its multimodal characteristics, the plurilingual *kamishibai* in a school context can promote the valorisation of the others, their languages and traditions, and the development of literacies. Among the tools for teaching languages and learning to read and write through storytelling in kindergartens, the *kamishibai* occupies a special place. (Faneca, 2020, p. 225)

The stories of the plurilingual *kamishibai* should integrate at least four languages, seeking to mirror the reality (diversity) of the languages spoken by students while still safeguarding, as far as possible, the general understanding of the narrative.

Creating a *kamishibai* using multiple languages leads to a reflection concerning the languages used in the school. It is also a great way to enable the learning of other languages used by children, families, or teachers within the school.

In the plurilingual *kamishibai*, the languages also contribute to the construction and development of the story. The challenge is to design a coherent narrative using a set of languages that will appear during the telling**.**

Thus, the plurilingual *kamishibai* emerged, gaining a plurilingual and intercultural dimension focusing on plural approaches (Candelier et al., 2010). That means that the plurilingual *kamishibai* incorporates the characteristics of a traditional *kamishibai* while adding various languages and cultural aspects to the narrative and illustration.

2.4. Drama and Theatre

Drama and theatre can come together with mutual advantages to find appropriate solutions to conflict resolution. Recently, United Nations Educational, Scientific and Cultural Organization (Comissão Nacional da UNESCO, 2006; Organização das Nações Unidas para a Educação, a Ciência e a Cultura, 2000a) advocated teaching and learning of visual and scenic arts as part of the construction of a culture of peace while also emphasizing the need to consider new types of education — more balanced, which meet the requirements and needs of the 21st century. These are, notably:

- promoting the development of the child's personality, talents, and mental and physical abilities to their fullest potential;

- instilling in children the respect for human rights and fundamental freedoms and for the principles enshrined in the Charter of the United Nations;
- instilling in children the respect for their parents, their cultural identity, language, and values, for the national values of the country in which they are living, the country from which they may originate, and for civilizations different from their own. (Convention on the Rights of the Child, 1989, p. 9, Art. 49)

Creative drama, such as kamishibai, is deemed a powerful educational resource to improve children's communicative and cognitive skills (Barret, 1993). It aids children to develop their critical skills, creativity, communication as well as their writing and speaking skills.

Creative drama fosters students' imagination and desire to learn, whether in (serious) action or in (play) acting, to reinforce their emotional, interpersonal, and educational objectives. Indeed, creative drama shows students how to be appreciated and to understand the needs of others, which will enable them to make value judgments and develop a critical attitude.

3. Intercultural Mediation

In a modern society characterized by various types of mobility and a plurality of identities, there is an increasing need to interact linguistically and culturally with others in a suitable way. Thus, multicultural education should be complemented by acquiring intercultural skills (United Nations Educational, Scientific and Cultural Organization, 2006, p. 17). That implies the development of a range of factors (skills, knowledge, and attitudes) that will allow children to interact with people from different cultures, always maintaining an appropriate dialogue without offending sensibilities — in absolute respect and consideration for their "right to the city and to difference" (Sandercock, 2004).

The contemporary society we live in, complex and paradoxical, is marked by the dynamics of the constant intersection between nations, communities, and people, which is reflected in cultural plurality. Thus, it is very likely that, in some way, we may be faced with situations where the mastery of a wide range of skills[7] is required to understand cultural differences as a challenge and as a possibility of enriching personal experiences.

Several international organizations, such as the United Nations Educational, Scientific and Cultural Organization, the Council of Europe, and the European Union itself, have reflected on this issue and how the development of these skills might contribute to the promotion of world peace and the prevention and management of current conflicts. To this end, a series of guiding documents for the educational system has been launched (Organização das Nações Unidas para a Educação, a Ciência e a Cultura, 2000b). They seek to lay the foundation for a peaceful understanding among all through the development of knowledge, attitudes, and competences that equip us to interpret an event or document in an intercultural context — to acquire, autonomously, new knowledge about other cultures — and to develop an acute cultural sensitivity towards our current society and its

[7] An open and respectful exchange of views between individuals and groups with different cultural backgrounds, based on mutual understanding and respect (Council of Europe Ministers of Foreign Affairs, 2008).

values and practices (Council of Europe Ministers of Foreign Affairs, 2008). That makes it possible for us to navigate markedly complex environments filled with various peoples and lifestyles and grasp the richness that cultural diversity brings to our personal experiences.

4. Methodological Design: Research Questions, Objectives, and Methodology

4.1. Methodology

This study may be characterized as an exploratory qualitative investigation of the pedagogical and didactic aspects of the plurilingual *kamishibai* in terms of the awareness/creation of IC in elementary school children aged between 6 and 9 years old (Lei n.º 85/2009, 2009).

To outline the object of study and the research plan, its analytical purposes, and the corresponding methodological strategy, we draw on the techniques recommended by Coutinho (2013).

The choice for the qualitative research paradigm was based on the dynamics of contemporary society and the fact that such a paradigm provides greater flexibility and reflexivity throughout the research work, that is, it allows authors to highlight the descriptive, interpretative, and comprehensive character of social reality and to reflect on the issue of cultural diversity and interculturality within the field of education. Thus, following a qualitative methodology supports better structuring of the research effort and the treatment and analysis of the collected data.

The merits of teaching/learning IC in school using the plurilingual *kamishibai* offer a pragmatic background — simple, clear, and concise — thereby enabling a critical reading of reality. It establishes the causal link between the object of study and the knowledge and its theoretical conceptions, intending to provide an objective explanation that facilitates the entire process, thus creating the epistemological basis for elaborating the theoretical and empirical corpus of the study.

This study seeks to answer the following questions:

- What is the potential and what are the limitations of the plurilingual *kamishibai* in promoting and enhancing IC?
- How can educational resources that contribute to the acquisition/development of IC be developed?
- How can the plurilingual *kamishibai* become an instrument that facilitates dialogue and inclusion in school?

To this end, seeking to verify the plurilingual *kamishibai*'s potential for the development of intercultural competences in an informal educational setting, the following elements were analysed:

- four plurilingual *kamishibai*, produced in a non-formal educational context of curricular enrichment activities by 1st and 2nd-grade elementary school students in the context of the 2020/2021 plurilingual *kamishibai* contest (Faneca, 2021);
- the representations of the teachers expressed in the logbooks that accompanied the production of the competing plurilingual *kamishibai*;
- a survey of 62 children.

4.2. Project Stages

The project was divided into four stages involving: literature review and design of data collection instruments, collecting and organizing data, interpreting data and analysing information, and writing the final report with recommendations.

The results presented here are part of a broader research project intended to emphasize the importance of the *kamishibai* in stimulating in students the necessary mental structures for the acceptance of difference and plurality and integrating them into the daily life of schools, thereby contributing to suitable intercultural communication and the creation of a sense of common belonging.

5. Results and Discussion

This work was developed in the context of non-formal education within an area designed as curricular enrichment activities. The elementary school chosen belongs to a town in the school cluster of the district of Santarém (Portugal). In partnership with the University of Aveiro, an innovative science education project is being developed there, and the school is responsible for designing, planning, and promoting several workshops, including one on plurilingual *kamishibai*.

5.1. Survey

5.1.1. Characterization of the Student Profile

The answers discussed below stem from a survey to 62 elementary school students in the context of a curricular enrichment activity. The survey included 27 questions divided into three sections. The questions in the first section (general information — "me and the world around me") sought to outline the profile of the students and collect data to assess the importance of the project, namely regarding its potential in raising students' awareness of linguistic and cultural diversity. The questions in the second section referred to the relationship between school/and family. The third section included questions on the students' intercultural learning from their involvement in producing a *kamishibai*.

The questions in the first section were open, closed in the second, and mixed in the third. This approach aimed to provide a diversity of answers. We can thus highlight the following:

- The students in this survey (62) are mostly female (38), and their age ranges between 6 and 8, with 26 students aged 6, 25 aged 7, and 11 aged 8 years old.
- The students attend the 1st and 2nd grades of elementary school, with 37 students in the 1st and 25 in the 2nd year.
- Regarding the fathers' educational qualifications, the majority (26) only have secondary education, whereas the majority of the mothers hold a bachelor's degree (29) or even a master's degree (23).
- Regarding parents' professions, as the data on educational qualifications indicates, they are from the upper-middle class, for the most part.
- A majority of the fathers (22) are aged 40 to 45, and only four are aged 25 to 30. Of the mothers, 21 are in the 35–40 age group, with only four mothers in the 25–30 age group.

5.2. The Cultural Reality

The survey also included questions looking at participants' cultural realities. These aimed to understand the contribution and implications that intercultural education can have on students' personal and social development by verifying and identifying the traits of the school community regarding the cultural processes to which children are subjected. With this in mind, we highlight the following:

- The students' understanding of other people and cultural realities is balanced; that is, 33 are aware of the multicultural environment around them, and 29 are not. Thus, most respondents answered affirmatively to the question related to their knowledge of people from other countries/cultures. On this occasion, the number of those who do not know people with other origins is significant (29). The students referred mostly to the knowledge of other cultural realities through people from Brazil (11), China (eight), and France (six), while the remaining students (37) referred to several other countries.
- On how people from other cultures should be treated, the vast majority (61) stated that they should be treated with education and respect. Only one student felt that they should be treated aggressively.
- We noted that 36 parents have friends from other nationalities.
- From the sample, only seven children reported that their parents had prohibited them from interacting with people from other cultures, namely Brazilians (four), Chinese (two), and gypsies (one).
- However, 49 students think it is important to interact with people from other cultures.
- In another group of questions, subordinated to cultural questions, the respondents are divided equally into particular aspects of culture, like habits, education, diet, art, writing, and religion, prioritizing education (16).
- The idea that the relationship between people from different cultures is important was once again emphasized (45).
- The list of countries whose cultures students would like to know more about is quite diverse, with Brazil (20), France (16), and Italy (seven) standing out. The remaining choices (19) are divided, among others, between England, Luxembourg, China, and Angola. This choice has to do with these countries' economic preponderance and international projection (38).
- It is noteworthy that most of the respondents have many friends (57) and take that to be a very important aspect of their lives (62).
- Students choose their friends according to companionship (16), friendliness (15), fun (13), and protection (12), with issues of race, religion, and gender being relegated to the background, mentioned by only one student. However, many students would like to have friends from other cultures (54) and assume that it is easy to interact with them (49).
- This feeling of ease in interacting with people from other cultures is confirmed by the percentage of students who have no problems approaching new students from other cultures in school (49).
- Nineteen students have witnessed schoolmates being mistreated due to cultural aspects in the past. According to these students, the best way to report these incidents would be through the teacher (eight) or their parents (five). However, it is worrying that three students would have ignored these incidents.
- Once again, the importance of interacting with people from other cultures is reiterated, affecting one's understanding of the world around them, learning new languages (19), understanding and accepting differences (14), or even learning new ways of seeing, thinking, and acting (13).

5.3. Familiarity With the Plurilingual *Kamishibai*

In this group of questions related to the knowledge and experience with the *kamishibai,* the answers are unequivocal. They emphasize their appreciation for this

resource and their willingness to work on constructing and arranging a story. That may be due to their previous experiences and participation in the plurilingual *kamishibai* contest, promoted by the Laboratory of Language Education of the University of Aveiro as part of the *Plurieduca* project (analysis and construction of plurilingual competence — didactic paths for language education). This annual contest aims to encourage children aged 3 to 15 to develop a story using the *kamishibai* format, integrating four different languages into the narrative, including the school language. It is an occasion to incorporate multiple cultural aspects, usually ignored in the school setting.

We believe that, despite the socio-economic status of families and the privileged environment of the school, actions should be implemented to blur some of the figures presented, namely those that relate to a better understanding of difference and cultural diversity. In this case, we take advantage of the means provided by the plurilingual *kamishibai*, namely the promotion of intercultural competences in students and their emotional, social, and cognitive development, thus giving them greater self-confidence, imagination, empathy, cooperation/collaboration, concentration, and communication skills, among others.

The *kamishibai* has a pedagogical potential that can be applied to multiple situations, successfully mobilizing students' thinking schemes for the learning process[8]. At the same time, as children get involved in theatrical and artistic activities, this promotes the acquisition of other types of knowledge and competences, according to several authors (Boal, 2005; Spolin, 1978/2005; Vygotsky, 1991/2014).

The answers to the survey show that the students' involvement in the design, construction, and installation of the stories in a *kamishibai* format and the respective cards, takes them into a world of fun — humour, irony, and entertainment. The questions and answers regarding the stories, discussions, comparisons, and the creation of their own narratives and characters show that, in addition to enhancing orality and writing, participation in the *kamishibai* activity fosters the creation of the necessary mental structures for accepting difference and plurality, and their integration into the daily school life, thus contributing to good intercultural mediation.

6. Elaboration of the Plurilingual *Kamishibai*

The elaboration of the *kamishibai* considered the recommendations of the Kamilala network. The works should be developed in four stages, which unfold in several substages, according to certain objectives seeking to develop intercultural values/attitudes/competences (Faneca, 2021). The four stages are:

- stage of discovery;
- stage of language use;
- stage of realization;
- stage of performance.

[8] Reading, writing, observing, experimenting, proposing hypotheses, solving problems, comparing, classifying, ordering, analysing, and systematizing.

In the first stage of *discovery* (awareness of context languages), identical works are read and presented — with subsequent analysis and discussion. The underlying idea is to raise students' awareness of the multiplicity of languages and cultures around them, but also the resources they can mobilize for the task of producing a *kamishibai*. The next stage — *language use* — is intended to provide students with knowledge about the languages of other children/people with whom they share the same space, whether in their neighbourhood, street, or school. The *realization* stage (creating the *kamishibai* itself) — creating the story, setting, illustrations, and card arrangement, requires a division of tasks between participants; the production cycle ends with the final stage: *performance* (telling the *kamishibai*: the plurilingual show). Here, the children display the show they have produced, splitting the work, once again, into multiple tasks, such as narration and playing a musical instrument, among others.

6.1. The Plurilingual *Kamishibai*: A Stimulus to Cooperation

As has been shown, a *kamishibai* story fosters collaborative work among children from creation to execution since it engages them in:

- selecting the subject;
- selecting the characters, space, and time;
- defining the setting and the plot;
- creating the story;
- writing the texts;
- deciding on the rhythm of the narrative, and the transition of the cards;
- elaborating the storyboard;
- distributing the roles;
- creating the illustrations;
- defining the sound design;
- reading/representation.

The following steps were taken to answer the research questions and understand how the activities around the *kamishibai* can raise students' awareness of linguistic diversity and cultural issues, involving 62 children aged 6 to 9 years old, within the scope of curricular enrichment activities:

- development and analysis of a survey;
- analysis of the representations of the animators/educators expressed in the logbooks;
- analysis of four *kamishibai* competing for the 2020/21 edition of the plurilingual *kamishibai* contest.

This contest was under the theme "the world is changing faster than we had imagined", and its main objective was to encourage educational actors to develop projects open to linguistic and cultural diversity through the creation of plurilingual *kamishibai* cards, thus contributing to the development of intercultural education (Faneca, 2020). The four *kamishibai* produced for the contest were:

- *Plim! Plim! Tudo a cores!* (plim! Plim! All in colors!);
- *O mundo mudou!* (the world has changed!);
- *A máquina do tempo* (the time machine);
- *Mensagens mágicas* (magical messages)-

During the elaboration of the projects — from design to production — several steps were followed: coming up with a story (subject, title, development, choosing the characters, etc.); ideas regarding the illustrations; and choosing the keywords for the story and the languages used (when possible and depending on the subject chosen). That allows us to regard the plurilingual *kamishibai* as a pedagogical resource that has the power to develop intercultural values/attitudes/competences. These refer not only to the collaborative aspects of the design and creation process of the *kamishibai* but also to the reading and dramatization of the topics addressed. The public presentation of the work also confirms initial assumptions that highlight the advantages of (successfully) exploiting dramatic activities to address multicultural issues in a school context.

6.3. Representations of the Teachers/Animators

The teachers/animators' representations in the logbooks (identified by "LB" and by a respective number) are associated with the four *kamishibai* competing in the 2020/21 plurilingual *kamishibai* contest. Their analysis shows that the participation in this project was initially motivated:

> by the willingness to develop a project that involved linguistic and cultural diversity, but above all because it involved the newly arrived children who spoke other languages, thus promoting all languages in use, the respect for differences, sharing, and cooperation in the project's co-creation. (LB4)

Perhaps the main question expressed in the text is what this project can bring that is new and challenging to the group of children. The fact is that "we are increasingly citizens of the world, and there is a need to expand our knowledge of it, embracing differences" (LB1). Also,

> for the adults in the group, it was a very rewarding challenge, not only to witness the joy of children participating and their evolution but also to witness how beneficial it is for them and their development. This work also takes a different perspective on how languages can be approached and explored and the development and acquisition of captivating and facilitating strategies and tools to make activities more dynamic. (LB3)

It is certainly an "opportunity to involve all children and welcome their proposals, sparking their curiosity for the world's many different languages and cultures. In addition to being a captivating and creative experience, it promotes interest in reading" (LB1).

Thus, according to the results obtained, we can highlight the importance of this didactic tool in promoting an attitude of solidarity, open-mindedness, acceptance,

enrichment, and learning towards diversity and fostering a sense of hospitality, recognition, cooperation, and dialogue. Such characteristics enable the development of transversal competences in the curriculum that are essential to the learning process, not only at the school level but also at the social level (Pedley & Stevanato, 2018).

7. Final Remarks

Results show that activities seeking to raise awareness of cultural and linguistic diversity through the plurilingual *kamishibai* can contribute to the development of intercultural communication competences and knowledge in different scientific areas. Additionally, the plurilingual *kamishibai* can lead to more positive behaviours toward linguistic and cultural diversity, as reflected in the answers to the survey, such as: "the fact that we can develop a project aimed at linguistic and cultural diversity and conceive of new teaching-learning strategies and resources" (LB2), or "involve newly-arrived speakers of other languages to promote all languages in use, the respect for differences, the sharing, and cooperation in the project's co-creation" (LB3).

Therefore, the use of the *kamishibai* meets the challenges posed to educational agents, promoting a significant improvement in linguistic and visual understanding and the potential for its application in all the subject areas covered by the school curricula (McGowan, 2015). For McGowan (2015), building a *kamishibai* invites students to engage in collaborative work and think critically about the structure and production of the *kamishibai* according to their own experience and culture, adding innovation and diversity to the entire process. For an elementary school student, using the *kamishibai* makes things easier and more appealing, "allowing communication and cooperation of children, both during the creation and the presentation" (Faneca, 2019, p. 361). It is easier because it is more intuitive, allowing the student to build the story according to a structure that includes an introduction, an exposition, and a resolution of the problem through images. On the other hand, speaking about interculturality — and plural identities — at school points from the outset to the fact that multiculturalism needs to be discussed in a classroom setting in order to approach any existing prejudices so that children can develop a heterogeneous and plural perspective regarding social groups and respect differences.

The school is certainly among the places where cultural diversity is most clearly manifested, thus requiring greater attention from teachers to deal with these constraints using appropriate strategies.

Many studies (Aguilar, 2001; Arroyo, 2007; Dewey, 1900/2003; Fuegel & Montoliu, 2000; Spolin, 1978/2005) have confirmed the efficacy of creative drama as a teaching method in several educational stages. This approach leads students to find their inner strength and apply it (Arroyo, 2007). It emphasizes the importance of students mobilizing their own competences, intelligence, and imagination to help them learn through their activity. Using creative drama also supports the development of linguistic skills (reading and writing) and vocabulary while stimulating higher-level cognitive processes (Fonseca, 2016).

Teachers/educators may experience some difficulties implementing creative, innovative, and flexible strategies to support their work as education professionals in contexts of great cultural diversity (Candelier et al., 2010) and with students who present preconceived ethnic-racial concepts and images. We have thus intended to provide teachers, in their daily pedagogical practices, with diversified strategies to deal adequately with cultural heterogeneity — stereotypes and prejudices.

The school's social role as a privileged place for promoting a fairer and more egalitarian society is highlighted since it is where young people and children have the initial opportunity to start showing and developing their cognitive and social skills (Pintassilgo, 1998). Therefore, it is essential to develop activities that value interculturality in school through collaborative work creating and producing *kamishibai* stories, namely the process of choosing the subject, creating the story, assembling and designing the cards, and so forth. Such activities seek to amplify and strengthen actions that, to some extent, may combat prejudice and discrimination so that no form of intolerance or unequal treatment is allowed, both inside and outside the school. To tackle these challenges, the Portuguese educational system, under the *Projeto de Autonomia e Flexibilidade Curricular* (Project for Autonomy and Curriculum Flexibility) for primary and secondary school education, grants the school community a greater centrality in the management of curricula (Despacho n.º 5908/2017, 2017). In this regard, several guiding documents were also introduced, such as the profile of students leaving compulsory education (Martins et al., 2017); the *Estratégia Nacional de Educação para a Cidadania e as Aprendizagens Essenciais* (National Strategy for Education on Citizenship and Essential Learning; Monteiro et al., 2017), among others (Conselho Europeu, 2008; Convenção Sobre a Protecção e a Promoção da Diversidade das Expressões Culturais, 2005). Together with the work developed by students in these plurilingual *kamishibai* projects[9], they lead us to issues that concern citizenship, values, and sharing of ideas and opinions. Thus, it is possible to integrate a set of principles, areas of knowledge, competences, and values that equip students to respond to the complex challenges of this century and to face the unpredictability of the evolution of knowledge and technology (Martins et al., 2017; Monteiro et al., 2017; Tenreiro-Vieira & Vieira, 2000, 2013).

As seen, the potential of using the plurilingual *kamishibai* in teaching/learning spaces is unlimited. Indeed, as a form of oral/visual narrative, it provides a unique opportunity for students to broaden any research/reading/subject they are involved in, employing their own words and ideas. At the same time, using the *kamishibai* enables: "widening and enriching students' visual and artistic experiences, contributing to the development of aesthetic and artistic sensibility, awakening, throughout the learning process, the taste for appreciation and enjoyment of different cultural circumstances" (Ministério da Educação, 2018, p. 1).

Raising children's awareness of their place in the world and history using the plurilingual *kamishibai* may foster a greater understanding of how this resource can enhance

[9] In the choice of subject; in designing the setting and the plot; in collaborative writing; in the storyboard; in the illustrations (Faneca, 2020).

learning and implement an approach to linguistic and cultural diversity within the school. School plays an essential role in promoting attitudes and values that form the basis of students' civic education — as a counterpoint to prejudice and discrimination since "the *kamishibai* provides a rich and genuine experience, improving the children's well-being, stimulating the motivation to learn and promoting a more committed engagement to learning" (Faneca, 2019, p. 373), — and in making students aware of their own imagination while also having fun.

This study offered a close look at the effectiveness of using the plurilingual *kamishibai* as an educational tool — its impact on the learning and teaching process, on children's self-development, their communication and thinking skills, but above all on the acquisition of intercultural competences — which is an uplifting and positive experience for all (Paatela-Nieminen, 2008). We believe that exploring the plurilingual *kamishibai* for educational purposes undoubtedly reinforces the relevance and visibility of education open to linguistic and cultural diversity.

Translation: Francisco Rocha (with revision of Filipe Jones Mourão)

Authors' Contribution

Francisco Rocha developed the conceptualization, the resources, the investigation and writing – original draft. He also developed the methodology. Rosa Maria Faneca participated in writing – original draft and writing – review and editing. She was responsible for the validation and supervision and also co-developed the methodology.

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The Film *Ilha da Cova da Moura*, the Media and the Permanence of Racism in Society

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Abstract

Beyond school, political discourse, and cultural products, the media play a central role in young people's learning process and in the (re)construction of reciprocal representations'. Television, social media, and cinema are pivotal in the diffusion and reification of certain social representations. In this article the narrative of the film *Ilha da Cova da Moura* (Island of Cova da Moura) by Rui Simões (2010) will be explored, comparing the characters' testimonies with the outcomes of the interview with the director. This film explores three central themes: (a) the importance of membership and collective mobilisation in the neighbourhood; (b) the idea of belonging to and agency in the community; and (c) prejudice and racial discrimination experienced by inhabitants of the neighbourhood. In this film, the director aims to deconstruct stereotypes attached to the neighbourhood. We argue that this and other films can be important tools for multidimensional and multicultural media literacy. It is important to create spaces during the children's and young people's educational process where commonplaces about racism can be discussed and contested. The arts, specifically cinema, play a key role in this process.

Keywords

racism, media, cinema, *Ilha da Cova da Moura*

O Filme *Ilha da Cova da Moura*, os Média e a Permanência dos Racismos na Sociedade

Resumo

Para além da escola, do discurso político e dos produtos culturais, os média têm um papel central no processo de aprendizagem dos jovens e na (re)construção de representações recíprocas. A televisão, os média sociais e o cinema são centrais na difusão e reificação de determinadas representações sociais. Neste artigo, exploramos a narrativa do filme *Ilha da Cova da Moura* de Rui Simões (2010), cruzando os testemunhos das personagens com os resultados da entrevista ao realizador. Este filme explora três temas centrais: (a) a importância do associativismo e da mobilização coletiva no bairro; (b) a ideia de pertença e a agência na comunidade; e (c) o preconceito e discriminação racial vivenciados por habitantes do bairro. A intenção do realizador com este filme é desconstruir os estereótipos associados ao bairro. Argumentamos que este e outros filmes podem constituir instrumentos importantes para uma literacia mediática multidimensional e multicultural. Importa criar espaços, ao longo do processo educativo de crianças e jovens, nos quais os lugares comuns do racismo possam ser discutidos e contestados. Neste contexto, as artes, e especificamente o cinema, têm um papel primordial.

Palavras-chave
racismos, média, cinema, *Ilha da Cova da Moura*

1. Introduction

This paper proposes a thematic analysis (Braun & Clarke, 2006) of the narrative of the film *Ilha da Cova da Moura* (Island of Cova da Moura), by Rui Simões (2010), by comparing this data with the outcomes of the interview with the director held in Lisbon in 2013. Our premise is that cinema can generate possibilities for contesting and debating stereotypical representations of reality, playing an important role in transforming racist and xenophobic imaginaries.

Ilha da Cova da Moura (2010) develops from a perspective that seeks to understand the positive side of the neighbourhood. It shows us life in Cova da Moura through a series of glimpses into the day-to-day life of the people of this community. The director follows the daily life of the neighbourhood's residents, interviewing young people and adults, women and men, and showing different realities of this place. He portrays scenes from day and night, parties and work, the street and the house, showing the inhabitants' representations of the relationships within and outside the neighbourhood and their experiences of racism.

After completing his secondary education, Rui Simões, the documentary's director, left the country in 1966, avoiding military service and mobilisation to the colonial war, with which he did not agree. He settled in Paris and then in Brussels, where he attended the École Ouvriére Supérieure and a History course at the Université Libre de Bruxelles. In 1970 he was a student in the Cinema and Television Direction course at the Institut des Arts de Diffusion (Brussels). He made his first film at this institute, still working as a scene photographer in big film productions and as a projectionist in a cinema. He returned to Portugal after the Carnation Revolution. He worked for the company Animatógrafo of António da Cunha Telles as production director. He took on pedagogic functions in training courses in various institutions. He is responsible for the production company Realficção (Lisbon), where he also develops audiovisual and multimedia pedagogical activities.

In an in-person interview (Lisbon, 2013), the director states that the motivation for making this documentary stemmed from his feeling that there was a great injustice in the way the press treated the Cova da Moura neighbourhood. He argues that Cova da Moura is one example of many. The author suggests that there are many "Covas da Moura" in our country and worldwide. In his opinion, the way the press represented the neighbourhood, constantly associated with violence and drug trafficking, was unfair. As Rui Simões recalls:

> one day there was a story about the famous dragnet on a beach near here, in Carcavelos, which was on the front pages of the newspapers, in magazines everywhere, that a group of Blacks from Cova da Moura had robbed

> the whole beach, that's it! And a while later, it was proven to be false. It was false news, this is scandalous, and I was shocked.

As later proven, the people running along the beach were startled by police intervention. The "dragnet", which never existed, was somehow created by police, media and political institutions' discourses (Varela, 2021), thus demonstrating the role of these structures in the reification of racism.

The director was not familiar with the neighbourhood, so he tried to learn about it and understand what was going on. He also wanted to know why the "press goes after fake news, fuels on newspaper headlines, accuses, is racist, becomes racist, and attacks a community in a certain way!" (R. Simões, in-person interview, Lisbon, 2013). With this goal in mind, Rui Simões asked to be introduced to the neighbourhood community and decided to make a documentary about the people living there. As stated in the synopsis of the film *Ilha da Cova da Moura* (2010), the director tries to explore the violence and insecurity so often connoted to the place and the reasons for the persistence of these perceptions. By analysing the day-to-day life of its residents, the director thus sets out to study Cape Verdean culture in its various manifestations and how social exclusion is perpetuated from generation to generation.

Almost simultaneously, Rui Simões directed *Kolá San Jon É Festa di Kau Berdi* (Kola Saint John Is a Cape Verte's Festivity; 2011), with the Cova da Moura neighbourhood inhabitants, most of whom are Cape Verdeans it is a film about a traditional festival from their native islands, a ritual typical of June festivities. This documentary accompanies a group of the neighbourhood's residents on a trip to Cape Verde to celebrate the Saint John festivities.

2. Racial Discrimination and the Media

Racism has transformed considerably over time. There is a great distance between its classical expressions, which claim to be based on science, and its contemporary forms, which increasingly refer to the idea of difference and incompatibility between cultures (Wieviorka, 2002). Racism is to characterise a group of human beings by "natural attributes, in turn, associated with intellectual and moral characteristics that are valid for each individual within that group, and, from there on, to eventually establish practices of underestimation and exclusion" (Wieviorka, 2002, p. 11). In fact, "all cultures build categories to know, classify and think the 'Other'" (Casa-Nova, 2008, p. 150), but that is not the problem. "The problem lies in the construction of categories to demean that 'Other'" (Casa-Nova, 2008, p. 150).

According to Brah (1996), in Europe, we do not deal with just one but several racisms. There are multiple racisms, based on skin colour, towards groups defined as non-White. Meanwhile, the concept of immigrant has become the quintessential term for "race". Being an immigrant is the primary trait that allows classifying individuals in a racist typology (Balibar & Wallerstein, 1991, p. 32).

Pettigrew and Meertens (1995) and Pettigrew et al. (1998) discriminate between blatant and subtle racism. The authors provide a multidimensional model of blatant and subtle prejudice. Blatant prejudice is "hot, closed and direct" (Pettigrew & Meertens, 1995, p. 58) and has two components: threat and rejection and opposition to intimate contact with the outgroup. Subtle prejudice, which is "cool, distant and indirect" (Pettigrew & Meertens, 1995, p. 58), has three components: the defence of traditional values, the exaggeration of cultural differences and the denial of positive emotional responses. Based on a study of 4,000 respondents from four western European countries, the authors categorised participants using their scores on blatant and subtle racism measures. They found greater adherence to subtle racism than to blatant racism, which may be related to the fact that blatant racism is perceived as anti-normative but not subtle racism.

Although condemned by legal and social norms, blatant and subtle racism persist in our societies. Much of everyday discriminatory behaviour, whether at the institutional or inter-individual level, is marked by more veiled and sophisticated forms of racism, often unnoticeable, which apparently do not breach the anti-racist norm. The fact that racial hierarchies have legally disappeared from the public discourse does not mean that racism is over. Cultural differences are emphasised since the argument of inequality and racial hierarchies is currently counter-normative (Cabecinhas, 2008).

Notwithstanding the differences that may exist among theories of racism, they all agree that the new expressions of racism are disguised and indirect and characterised by the intention of not hurting the norm of equality and not threatening the self-concept of the social actors as equal persons (Lima & Vala, 2004). That is not to say that the more traditional and open forms of racism have ceased to exist or have lost significance. In a formally anti-racist society, new forms of expressing racism persist and seek to coexist with the anti-racist norm. These "new expressions of racism, more veiled and hypocritical, are as or more damaging and harmful as the more open and blatant expressions since, being more difficult to identify, they are also more difficult to combat" (Lima & Vala, 2004, p. 408).

Common to all these more veiled forms of expressing racism is their ability to translate into violent expressions (Lima & Vala, 2004). As the media have recently informed us, some of these manifestations have generated a set of anti-racist social movements of global impact.

Some recent studies have corroborated previous research and highlighted the impacts of racism on immigration policies. Ramos et al. (2019) show that people are more willing to admit that some cultures are much better than others rather than acknowledging that some groups are born smarter and fitter to work than others. In more than half of all countries surveyed, including Portugal, 30% or more than 30% of respondents believe in the natural superiority of some human groups.

Although fighting racial discrimination is considered a priority by several international and national entities, in recent years we have witnessed an intensification of discourses of racial hatred in the public sphere and the erection of walls in several European countries (Cabecinhas & Macedo, 2019). On top of that, several reception studies have

confirmed that negative stereotypes about African immigrants and their descendants persist in Portuguese society, suggesting that the colonial past still influences young people's imaginary and social identities (Macedo, 2017; Pereira et al., 2019). While in the European context, there have been constant reports of blatant racism relating, for example, to security forces' intervention, recently this debate has become increasingly relevant in Portugal. However, the complaints of several anti-racist associations and organisations are long-standing (Maeso, 2021). The classification of neighbourhoods "is closely related to the representation of African descendent/Black and Roma/Gypsy youth as 'naturally averse to authority'" (Maeso, 2021, p. 121). These representations, conveyed by the media, in particular, are generally based on the criminalisation of the Black population (Varela, 2021).

3. Alto da Cova da Moura in the Media

Alto da Cova da Moura neighbourhood is located on the outskirts of Lisbon, approximately 15 km from the capital, with easy access to public transport. It is part of the parishes of Buraca and Damaia in the municipality of Amadora (Beja-Horta, 2008). The formation and consolidation of Alto da Cova da Moura neighbourhood can be divided into four distinct stages. The first one dates from the 1940s to 1974 and corresponds to the beginning of the neighbourhood's formation. The second stage covers the period between 1974 and 1977. This stage represents the beginning of a new development process characterised by flows of Portuguese immigrants and repatriates from the former colonies and the emergence of new construction and urban development processes in the neighbourhood. The accounts documenting its origin and development by Cape Verdeans, Portuguese, Santomeans, Angolans and Guineans from the former colonies and the Portuguese rural inland reveal a colonial context extending beyond the independence of African countries (Jorge & Carolino, 2019).

The third period runs from 1977 to 1989 and coincides with the first population boom, leading to the consolidation of the neighbourhood. Also, during this stage, popular migrant organisations were created. Finally, the last phase begins in 1989 and stretches to the present. During this period, there was great acceleration of new flows of immigrants, many of them in irregular situations, and the construction of "dominant official representations" about the neighbourhood as an "urban problem" (Beja-Horta, 2008, p. 184). As Beja-Horta (2008) states, "the residents, like the native population living in the neighbourhood, activated social networks of friendship and solidarity. They reproduced and reconfigured new cultural practices" (p. 202), struggling with social and political problems of their native country and with hard work to improve their living conditions in the host country.

> Alto da Cova da Moura neighbourhood extends over 18 hectares with 1,617 houses and about 6,000 inhabitants, mostly Cape Verdeans and their descendants and Portuguese who returned from the former colonies, Angolans, Guineans, Santomeans, Mozambicans, Brazilians and people from eastern European countries. 45% are less than 25 years old. (*Ilha da Cova da Moura*, 01:17:43)

Over time, the actors have developed various strategies to ensure the right to remain in one area of the city that is increasingly more central and, therefore, desirable from the real estate point of view, where they have developed their own forms of relationship, identification and belonging (Jorge & Carolino, 2019).

Anti-racist organisations in Portugal have been denouncing police brutality, violence, and harassment by extreme right-wing and neo-Nazi organisations since the late 1980s (Maeso, 2021). In today's societies, the different media are important contexts for the production, reproduction and transformation of ideologies. They produce representations of the world, images, and frameworks for understanding the world around us.

The media's symbolic construction of peripheral neighbourhoods, official discourses and public opinion, in general, has conveyed a negative and stigmatising image of these places and their residents (Beja-Horta, 2008). Cova da Moura is one of the most stigmatised neighbourhoods in Portugal. "A false imaginary associates it with 'drugs' and 'weapons', with 'criminals' and 'young delinquents', resulting from a labelling process built by the media and political institutions" (Raposo & Varela, 2016, p. 5). These discourses are co-responsible for creating an imaginary of transgression, incivility and anomie about these territories being racially connoted places (Raposo & Varela, 2016).

This mediatisation of urban spaces such as Alto da Cova da Moura, relating them to deviant behaviour, profoundly impacts the processes of exclusion of this population. The neighbourhood is often reduced to a stereotypical imaginary construction that becomes hegemonic and is widespread and amplified by the media. Its inhabitants, especially young people, are perceived as potentially threatening the prevailing social order. Stereotypes consist of mental images interposing in the form of biases between the individual and reality. They are generalised and exaggerated images that neglect the variability of the members of other groups, denying their individuality (Cabecinhas, 2002, 2004; Lippmann, 1922/1961).

On the other hand, its inhabitants see the neighbourhood as a place where casualness, sociability, hospitality, and being outside predominate and are associated with an experience of something considered an African or Cape Verdean way (Santos, 2014).

In a study developed by Carmo (2018), the author states that

> most (54%) respondents claim to have been victims of discrimination for living in Alto da Cova da Moura, wherein searching for employment (71%), the relationship with the police (68%) and going to commercial establishments (56%) are the most referred discriminatory contexts. Equally relevant is that "poverty and unemployment" were considered the neighbourhood's main challenges by 88% of the respondents, with 58% referring to housing conditions, 40% to stigmatisation and image, and 39% to insecurity and criminality. (p. 591)

Local associations have played a central role in claiming the right to the regularisation of the land situation, the rehabilitation of the neighbourhood, the provision of social services, the need for a security policy and the construction of a positive image of the

community (Beja-Horta, 2008). The collective actions implemented by the associative movement of Cova da Moura are anchored in reinforcing the socio-spatial identity and the ability to develop joint strategies of mobilisation and claim. For example, in February 2015, young people from this neighbourhood were the target of police violence, and several representations were published in the national and international press. This event prompted Cova da Moura residents to organise a mobilisation against police violence and racism, which counted on the solidarity of other neighbourhoods and broad civil society sectors (Raposo & Varela, 2016).

For decades, the racialisation of these neighbourhoods has been supported by images of transgression and marginality disseminated by the media, influencing society's representations of their residents. According to Raposo and Varela (2016), this imagery was supported by countless newspaper and television news "through the equation poverty-blackness-violence-neighbourhoods and produced a caricatured interpretation of these territories" (p. 10), which urgently needs to be deconstructed and contested. The media have a fundamental role in constructing violent events and conflicts and in stigmatising spaces and their populations residing in them. The media participate in the "co-construction of conflicts and violent events, amplifying them and providing visibility to the perpetrators" (Malheiros et al., 2007, p. 36). Besides amplifying a violent phenomenon, the media can deform it, for example, through how images are captured, the choice of interviewees to include in the piece and how the collected testimonies are selected and delivered. Even when there is a concern to give a positive image of immigrants, in doing so, journalists and filmmakers play with stereotypes and concepts naturalised in common sense. Sometimes they try to deconstruct them, and other times they get involved in the stereotypes they convey, even without realising it (Costa, 2010). This article approaches racism as a social phenomenon, rooted in societies and their collective memory, often learned and reproduced in an unconscious or naturalised way.

4. Analysis[1]

The documentary *Ilha da Cova da Moura* (2010) explores three central themes: (a) the work developed by Associação Cultural Moinho da Juventude (Youth Mill Cultural Association) and the support it has been giving to the neighbourhood community; (b) the idea of belonging to the neighbourhood and the agency associated with investment, freedom and identification with the community's cultural and social aspects; and (c) testimonies about the violence, prejudice and discrimination experienced by neighbourhood residents.

4.1. Moinho da Juventude, Membership and the Construction of the Social Space

As far as residents' organisations are concerned, Moinho da Juventude and Clube Social e Desportivo da Cova da Moura (Social and Sports Club of Cova da Moura) are

[1] An initial analysis of this film can be found in Macedo (2017).

regarded as central associations in the community. They offer legal and cultural services, and economic and social support, mainly to vulnerable families. Moinho da Juventude provides meals for children whose parents arrive late from work and, in many cases, have two jobs. These associations offer spaces for socialising, social organisation, re-interpretation of traditions and mediation between the country of origin and the host country (Casimiro, 2014). This association had, over time, a vital role in the process of socialization, strengthening cultural bonds, affirming identity, solidarity and mutual aid practices. That and other organisations provide privileged spaces for social and political mobilisation to defend the interests of their members.

In the film, the director's journey through the neighbourhood is guided by a young man of 25 who is an intercultural animator and mediator at Moinho da Juventude. They tour in a car, while the young man mentions that Cova da Moura is like an island in the middle of Damaia, Buraca, and Alfragide. For this young man, the association is the "heart of Cova da Moura" (00:10:09). For decades it has contributed to better living conditions for the community. In this journey, he also mentions that the neighbourhood is formed by "many Cape Verdeans and many returnees" (00:26:04). However, he adds that some people do not live in the neighbourhood, but they come to socialise with them.

The association director mentions that mothers would depart early in the morning to sell fish at the riverside. The children were left alone because they would only come back around 1pm/3pm, and the older ones would look after the younger ones. Currently, the association prepares daily meals for more than 400 people, distributed across Cova da Moura, including family nurseries. She further notes that they have always invested in culture and created a library and a drumming group, the Kola San Jon group, underlining that there has been much work from community members.

Interviews with community members from various generations reflect their involvement and dedication to the neighbourhood.

> A lot of people... Actually, I'm not ashamed, but many people are ashamed to say they live in Cova da Moura because they say, but where? in that... where... was found? My husband bought it here from a man who was starting to build a house here, but then he gave up, so we bought the brick he had and so on, and so on... We began! We worked in the morning to eat at night. I worked as a maid. And he was also doing odd jobs so that we could manage. There was no water, nothing, no electricity, everything was done by hand, my children were very young, we all were... That's it... They went to work and built the houses at night, to tell you the truth. In the summer, it was after work, working till you could see. It was very hard, very hard indeed. That's why we love it so much. (00:12:18)

> - We loaded the material ourselves when it came in the van. And when people talk about the neighbourhood going down, it makes me very confused, because it was a lot of work, for many years.

> A lot of dedication also from our parents and...
>
> - Dedication, and 100% dedication because they went to work during the day and then at night when they got home, we had dinner and did something. (00:14:22)

From its inception, the founding members of the neighbourhood committee challenged the "disabling traits of an identity politics that pinned residents and the community to hegemonic representations of illegality" (Beja-Horta, 2006, p. 275). While lobbying local state agents for better services, they mobilised local labour to promote fundraising campaigns to subsidise the costs of building infrastructure (Beja-Horta, 2006, p. 275).

Mutual help and membership have played a central role in claiming several rights. The collective actions, led by the movements born in the neighbourhood, are anchored in reinforcing socio-spatial identity and the capacity to develop joint mobilisation and intervention strategies (Beja-Horta, 2008). With the valorisation of cultural differences and the social integration of migrant and ethnic communities into Portuguese society as its main objectives, Moinho da Juventude played a central role in this process.

4.2. Agency and Belonging

Besides the population's involvement in the neighbourhood's construction, freedom in cultural and social practices is also highlighted. One of the residents mentions that they cannot cook using firewood, grind corn, or hold parties in the buildings. For this young woman, anyone who comes from Cape Verde to the neighbourhood thinks that they are still in Cape Verde. According to this character, the elderly who visit the quarter say, "it looks like you are in Cape Verde because there are many things, from food to parties to tradition. We have many things here similar to Cape Verde" (01:07:36). For the young girl, "out there" is not the same, and they cannot have music at late hours, they cannot always be having parties, they cannot step on Cape Verdean corn, grill corn in the street, on the coals, they cannot cook over a firewood fire. She believes they should respect it when living "out there", but she feels more at ease in the neighbourhood (01:07:48).

The characters in the film constantly refer to casualness, sociability, hospitality, and being outside (Santos, 2014). The various testimonies of neighbourhood residents point to the freedom, togetherness and support they feel in their community. Although some could live elsewhere, they say they feel comfortable there and do not see themselves living elsewhere. In one of the testimonies, António, a policeman, says that few people in the neighbourhood know his occupation. He says that many people living in neighbouring areas regret having left Cova da Moura, he still lives there. When questioned about the reasons for still living in the neighbourhood, he asks:

> Why should I leave then? I don't have any problems with my neighbours. I don't get mad at anyone. If I want to walk barefoot in the street, no one will

> wonder why I'm barefoot in the street, so I don't see myself anywhere else.
> (Cut scenes, António Pedro, 00:01:25)

The images of parties, social gatherings, and support in moments of pain are recurrent in the documentary, for example, in the case of a funeral where several community members get together and share a meal. The participation of the group Kola San Jon and the party organised by the community also promote the integration and involvement of the residents in the neighbourhood's cultural and recreational activities. For the director, this community has created its own island, its own space, like other immigrant communities trying to create networks, unite and help each other in their destination countries.

4.3 Social Stereotypes and Racism

The third theme addressed by the film concerns violence, prejudice and discrimination. The documentary begins with a news report of clashes between police officers and neighbourhood residents. The images of police cars and officers patrolling the streets of the neighbourhood are constant, as is criticism of police officers. The director's attention to giving a positive image of the neighbourhood's residents is noticeable. However, the recurring images of the police may reinforce certain stereotypes and concepts that are naturalised in common sense. By seeking to break down stereotypes, filmmakers may ultimately become involved in the stereotypes they convey, even without realising it (Costa, 2010).

One of the residents refers that the police invaded his house by mistake. His testimony demonstrates that the agents' negative representations of the neighbourhood's population induce the perception of its inhabitants as a homogeneous body, adopting more automatic attitudes towards the people. That is the outgroup homogeneity effect or the tendency to perceive outgroup members as more similar to one another than the ingroup members (Cabecinhas, 2002). Such an effect contributes to social discrimination and the continuity of representations that are generally based on the criminalisation of the Black population (Varela, 2021). Although more veiled expressions of racism persist in today's society, its ability to transform itself into violent expressions (Lima & Vala, 2004) is visible in the testimonies and experiences of the characters interviewed by Rui Simões.

The filmmaker also interviews a couple of "returnees" from Angola, who had nowhere to live when they returned and built a house there. They say that they used to build shacks in Cova da Moura at that time. The couple talks about the prejudice towards the neighbourhood and how their youngest son suffered from it. They say that Cova da Moura has a "bad reputation" but that it is their home and they would not trade it for a place elsewhere.

The documentary also tells the story of a very young couple. The couple says that her parents did not accept the relationship and point to the prejudice and racism the young man suffered. Besides the phenotype, being from Cova da Moura adds to the discrimination based on social stereotypes, associating this neighbourhood with criminality. In the media, minority groups are frequently related to the problems of urban

crime and violence, unemployment, drug trafficking, the underground economy, insecurity, social costs and, more recently, terrorism (Marques, 2007). The generalisation of prejudices, the systematic discrimination in the various areas of social life, the violence of the language or the residential segregation are, in Marques's (2007) perspective, phenomena of greater extension inscribed in society. The young man points out that "the innocent carry the can for the guilty" (00:29:12). By the end of the film, the young woman has a baby, and you can see the father's happiness and excitement, along with the sadness because the child's maternal grandmother does not want to relate to the new family member.

> When we were sure she was pregnant, our first reaction was to tell her. The mother's first reaction, well, I'm not proud to say this, but I will, the thing is, she turns to me and says, "children of monkeys", she won't accept just like that. I don't want her to accept my child. Because the thing is, if she wants to give up her granddaughter, that's her problem. Now the thing is, I won't give up my children. (00:28:25)

"Basically, it's all prejudice of 'he's Black, he's from the Cova da Moura, and he's a bandit, a marginal, and that sort of stuff'" (00:29:04).

In an interview, Simões (in-person interview, Lisbon, 2013) stated that, although the film was built for the viewer, thus seeking to encourage their involvement, the fact that it is a DVD edition affords the director greater freedom. Some images and testimonies are not part of the film, but the director considers them essential for us to understand the reality under analysis. One of the testimonies is that of António, a character already mentioned, who believes that the criminality they are related to is everywhere and that people do not notice it. According to the policeman, the neighbourhood has criminality, but it does not compare "with the camouflaged amount out there" (Cut scenes, António Pedro, 00:02:07).

> And that's what I believe happens in my neighbourhood. As my neighbourhood is different, it draws more attention. It has always been and will always be. It's always the little guy who gets the raw deal, and there are no littler guys than us. We are the different ones; we are the ones who live in that neighbourhood, we are from a foreign country, we have a different culture, so we are constantly being watched, that's what happens. (Cut scenes, António Pedro, 00:02:41)

In fact, apart from this young man's testimony, there are several speakers in the documentary who address this racial issue by stating, for example, that "there's no such thing as Black Portuguese" (00:27:12) in the minds of most of the population. The young Black Portuguese are therefore seen as immigrants. These representations, combined with those related to what the media convey about the neighbourhood, deepen the situation of inequality and social discrimination among the younger generations. The "false imaginary" (Raposo & Varela, 2016) built around Cova da Moura, the result of a labelling

process created by the media and other institutions, is co-responsible for transforming this neighbourhood into a racially connoted space (Raposo & Varela, 2016).

> If I am now down there and I get angry with a white man in the street, the first thing he says to me is "go to your land", so I don't know if I'm really Portuguese. My father has a saying that he says, and we give it a lot of credit: "that there is no such thing as a Black Portuguese". And I believe that a lot, because if I were Portuguese, they wouldn't send me back home, would they? As I'm from here. (00:27:02)

The excerpts presented above, which refer to the testimonies of young people living in the neighbourhood, show the value they attach to their social belonging, particularly their belonging to that geographical and sociocultural space. Their social identity is built through comparison with their outgroup, highlighting that their social group does not negatively judge their behaviours.

Although their condemnation by legal and social norms, blatant and subtle racism persists in our societies (Cabecinhas, 2008; Pettigrew & Meertens, 1995; Pettigrew et al., 1998), as we can confirm by the testimonies of the characters in *Ilha da Cova da Moura* (2010). The negative representations of the neighbourhood's population also influence the perception of its inhabitants as a homogeneous body and not as individuals (Cabecinhas, 2007).

5. Final Considerations

This article tried to discuss the persistence and coexistence of blatant and subtle racism in society (Cabecinhas, 2008). Several reception studies have confirmed that negative stereotypes about African immigrants and their descendants persist in Portuguese society, suggesting that the colonial past still influences young people's imaginary and social identities (Macedo, 2017; Pereira et al., 2019).

Drawing on the thematic analysis of the film *Ilha da Cova da Moura* (2010) by Rui Simões and cross-referencing this data with the results of an interview with the director, we explored three central themes: reflections on membership, Moinho da Juventude and the construction of the social space; the feeling of agency and belonging to the neighbourhood; and the social stereotypes and expressions of racism experienced by the characters in the film.

Cova da Moura is one of the most stigmatised neighbourhoods in Portugal. However, over time, the residents have developed several strategies to ensure the right to remain in this area of the city. A place where they have been building forms of relationship, identification and belonging (Jorge & Carolino, 2019), seeking to challenge the "false imaginary" that associates it with crime (Raposo & Varela, 2016). This mediatisation of Alto da Cova da Moura, relating them to deviant behaviour, profoundly impacts the processes of exclusion of this population. The neighbourhood is often diminished to a stereotypical imaginary construction that becomes hegemonic and is

disseminated and amplified by the media. Local membership has played a central role in deconstructing negative representations about the neighbourhood (Beja-Horta, 2008), claiming several rights and collective actions of mediation, mobilisation, and intervention. Associative mediation may facilitate joint movements, fostering action among individuals with similar interests and needs and seeking solutions to the problems they face in the neighbourhood.

Although the director made this film to deconstruct stereotypes, the recurrence of images of police officers patrolling the neighbourhood may contribute to the reification of stereotypes and concepts naturalised in common sense. As we mentioned initially, although they try to deconstruct stereotypes, the directors may get involved in the stereotypes they convey, even without realising it (Costa, 2010).

The negative representations of the neighbourhood's population also influence the perception of its inhabitants as a homogeneous body and not as individuals (Cabecinhas, 2007). Throughout the film, the testimonies suggest that the characters' social identity is (re)constructed by comparison with their outgroup. The idea that their social group understands and does not judge their behaviour negatively and that its members are somehow interdependent is central in the testimonies of the film.

This and other films can be important tools for multidimensional and multicultural media literacy among diverse users, consumers, producers of all ages, and social and cultural levels. Challenging the way racism shapes thought and action requires not simply reacting to racist assumptions but creating structures and moments where the commonplaces of racism can be discussed and contested. The arts, school, and cinema play a key role in this process.

Although cinema is a communication medium common in the daily lives of young people, there is a gap in research on the part of the film in the process of critical deconstruction of young people's views of themselves and the world. Studies show that young people attach a central role to the cinema in their teaching-learning process (Macedo, 2016; Macedo et al., 2021; Pereira et al., 2019). Films that challenge the prevailing regimes of thought, whether in a classroom context or daily interaction with the media, allow the questioning of memories, imaginaries and knowledge and draw attention to silenced events and injustices, deconstructing stereotypes.

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The Accidental "Age-Friendly City": Public Expectation and Subjective Experience in São Paulo

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Abstract

Two optimisation projects, globally promoted, aim to respond to the challenges of contemporary urban life. The first one is *Smart Cities*, structured from a technological and informational apparatus that aims to make the city more efficient. The second one is *Age-Friendly Cities*, conceived to adapt urban environments to enable active ageing. Both projects are shaped in the neoliberal system as emancipatory proposals to empower citizens for participatory citizenship in the city. This article proposes that smart cities demand new skills for active ageing, causing challenges for age-friendly cities regarding digital inclusion and digital literacy. Bringing this discussion into the Brazilian context, we propose that for the elderly, none of these projects is wholly carried out. However, from an ethnographic perspective, we have mapped how a group of older adults in São Paulo builds their own informational network (centred on WhatsApp), enabling participatory and belonging instances from a perspective that comes "from below". From this mismatch between urban projects and experience, we point to the emergence of an accidental city that is informally smart and age-friendly.

Keywords

smart cities, active ageing, digital divide, citizenship, accidental city

A "Cidade Amiga do Idoso" Acidental: Expetativa Pública e Experiência Subjetiva em São Paulo

Resumo

Dois projetos de otimização, promovidos globalmente, visam responder aos desafios da vida urbana na contemporaneidade. O primeiro é o das *Cidades Inteligentes*, estruturadas a partir de um aparato tecnológico e informacional que passa a mediar a gestão da cidade, seu consumo e eficiência. O segundo é o das *Cidades Amigas do Idoso*, estruturadas a partir de ambientes que visam capacitar o crescente contingente idoso para o envelhecimento ativo na cidade. Moldados em um sistema neoliberal, ambos os projetos se apresentam como instâncias emancipadoras do cidadão para o exercício de uma cidadania participativa. Este artigo propõe que as cidades inteligentes demandem novas competências para o envelhecimento ativo na cidade, resultando em desafios para as cidades amigas do idoso no que toca à exclusão e literacia digital. Situando essa discussão no contexto brasileiro, propomos que para os idosos nem um projeto nem outro se

realiza integralmente. Entretanto, a partir de uma perspectiva etnográfica, mapeamos como um grupo de idosos de São Paulo constrói uma rede informacional própria, centrada no WhatsApp, que viabiliza instâncias participativas e de pertencimento a partir de uma perspectiva "de baixo". É nesse descompasso entre projeto e experiência urbanos que apontamos para a emergência de uma cidade acidental, informal, mas inteligente e amiga do idoso.

Palavras-chave

cidades inteligentes, envelhecimento ativo, exclusão digital, cidadania, cidade acidental

1. Introduction

Population ageing and urbanisation are phenomena that marked the 20th century. The World Health Organization (WHO) considers the relationship between them as one of the great challenges for the 21st century (World Health Organization, 2007). The fact that these issues are approached as a health matter is explained by the demand for cities to adapt to the needs of that population in order to provide a type of ageing that enables the citizens to age actively, which means ageing safely and healthily taking part in society. Therefore, the objective is to promote a healthy and productive life extended to old age. However, its output is not the well-being of the elderly alone. The recovery of their productive capacity would benefit the entire society. The demand for elderly people to remain as a resource to society and its consequences for old age should be taken as a consequence of two historical processes. Accentuated in the 1980s, both reflect the decline of the welfare state and the emergence of neoliberal societies, where citizens become responsible for managing their own needs (Dardot & Laval, 2009/2016).

The first process concerns the "internalisation of self-responsibility" regarding one's health (Schramm, 2009) when maintaining autonomy is mandatory for social inclusion and citizenship. The individual is expected to assume the position of an active State partner to build a healthy nation (Rose, 2001). From the standardisation of conducts considered a virtue emerges a biocitizen, functional and independent of the state (Rose & Novas, 2007). This demand requires mechanisms and discourses that operate on the moralisation of health and put the citizens under administration until the individuals internalise the duty to become the entrepreneur of their own health.

The second process is the construction of old age as a social problem. In this sense, old age is targeted as an obstacle to economic development due to exacerbated health demands and expenses related to retirement (Debert, 1997). The United Nations Vienna plan (United Nations, 1983), recognised as the first international instrument for policies on ageing, is also a landmark for framing the elderly population as a burden or a risk to the development of nations and the "new order". This perspective was reviewed almost 2 decades later, in the Madrid plan (United Nations, 2002), when the third age emerged as a potential resource for society (already in the role of protagonists in the ageing process).

This shift implies a redistribution of responsibilities characteristic of neoliberal politics. While it is up to society to create opportunities for active ageing, the state — in the management of old age — assumes what Rose (2001) proposes to be a role of "facilitator" or "animator". The individual would be then responsible for maintaining their autonomy and productivity, exempting the state and society. Adopting healthy habits would make it possible, an expectation supported by scientific research that attests that ageing in a healthy, autonomous, participatory, and productive way is a matter of individual choice (Rowe & Kahn, 1997). These outputs are taken as virtuous, shaping the image of the active third age, the object of the *Active Ageing: A Policy Framework* (World Health Organization, 2002), proposed by the WHO in 2002 — the same year of the publication of the Madrid plan (United Nations, 2002).

On the one hand, the active third ager is also a biocitizen (Duque, 2021a). On the other hand, every biocitizen should be born under the active ageing paradigm once the need to manage one's health and ageing in a preventive way starts to encompass all ages. However, this inclusive character of all generations in a virtuous project of old age needs to recognise that the elderly citizen has specific demands related to ageing. The *Global Age-friendly Cities: A Guide* — published by the WHO in 2007 (World Health Organization, 2007) — aims to respond precisely to these demands. The age-friendly city adapts its structures and services to enable active ageing. In other words, the age-friendly city creates opportunities or "enabling environments" — a term used in the Madrid plan (United Nations, 2002). In this sense, all citizens, including the elderly, can age actively, being participative and taking care of their health to remain a resource for society.

For this purpose, the *Age-friendly City* project chooses eight aspects of urban life: open spaces and buildings; transport; housing; social participation; respect and social inclusion; civic participation and employment; communication and information; and community support and health services. As the document highlights, these eight aspects are interconnected and affect each other. However, transport, communication and information play a central role in enabling active ageing in the city. Without communication and information, it is not possible to know where the opportunities for elderly people are. Without transportation, access to those opportunities is unfeasible.

This article explores the centrality of communication in participation and consumption in the city. The focus is the digitisation and connectivity (of information and services) that structure everyday life in the urban context and its effects on ageing. Therefore, we consider the interaction between the *Age-friendly City* and the *Smart Cities* projects. We argue that technology, still little addressed in the protocol of the age-friendly city, becomes a condition for life in the city and the exercise of citizenship in smart cities. Therefore, this technological and informational infrastructure demands new skills to move around the city and consume it, resulting in the exclusion of elderly people. For this analysis, focused on the Brazilian context, we have structured the article in three parts. In the first part, we address the concept of smart cities and investigate the literacies needed to live in these cities. In the second part, we discuss the barriers to adopting new technologies

by elderly people. Finally, in the third, we present the experience of a group of older adults in the city of São Paulo, analysing how they use technology to optimise the experience of active ageing in the city, in an unpredictable way. From this ethnographic observation, we verify the occurrence of a third city, an accidental city (Vielma, 2016), where participants recreate an intelligent and friendly city in their own way.

2. Smart Cities: For Whom?

The discourse on smart cities goes back to city mobility (Lemos, 2007). In this sense, the relationship between urban space and communicational forms undergoes essential transformations in the current phase of the information society. The origin of this discourse is present in the reorientation of large companies, such as IBM, especially concerning the need for optimisation in both the public and private sectors (Morozov & Bria, 2018/2019). Different financing initiatives and investments in implementation and research projects, urbanisation strategies and projects related to the future of cities place the city-technology axis on the urban agenda through the smart city concept. This social imaginary combines different tech-cultural discourses, encompassing ideas such as robotisation, big data, and the internet of things.

Considering that one of the biggest challenges in the coming decades is dealing with a growing and irregular global urbanisation, corporate digital solutions emerge as catalysts for changes capable of altering the course of society. As a result, technology companies found great potential customers in state and municipal administrations. These companies have appropriated the term "smart" to describe the city and promote their products and services. This scenario becomes even more relevant when we observe that the smart cities market should move $2,100,000,000 by 2024 ("Cidades Inteligentes: Mercado Deve Movimentar US$ 2,1 Trilhões Até 2024", 2021), extending to fields such as governance, education, energy, health, and security.

The smart city concept brings together three instances that give meaning to the term "smart". The first instance is physical, made up of the space infrastructure. The second instance concerns the administrative space constituted by governmental institutions and companies. And the third instance is structured by people and mediated by artificial intelligence coming from virtual environments for collaboration and learning. Although the discourse about the smart city has excellent adhesion in the collective imaginary regarding the future of cities and the quality of life, it is possible to group the initiatives in two lines of action (Figueiredo, 2016; Neirotti et al., 2014): on the one hand, there is a predominance of investments in infrastructure for massive data acquisition and processing; on the other hand, there are initiatives related to the promotion of education, entrepreneurship and innovation. Overall, these views do not mix and reveal that the evolution patterns of a smart city depend heavily on local context factors.

Economic development and urban structural variables tend to influence the city's digital path. However, the cities with more developed information and communication

technology systems are not necessarily better, just as the number of "smart" initiatives launched by a city's public administration is no guarantee or indicator of the city's performance in this segment. Strategies that aim to build more humane and democratic cities (through technology and data mining) can deepen surveillance mechanisms and promote more segregation (Figueiredo, 2016).

The way of visualising, programming and governing the city is also changing. Conclusion: there is a replacement of conventional patterns of political representation and social consensus, as citizens (individually) and local communities are increasingly held responsible for pursuing their well-being (Vanolo & Lombardi, 2015). This phenomenon converts cities into "collective actors", accountable for fulfilling their economic objectives. Therefore, there is a radical transformation in urban management: centralised management (controlled by the State) gives way to decentralised governance linked to networks and based on citizen's participation (who is at the same time, the user of the city and part of its intelligence).

Although the discursive regime related to the promotion of smart cities is quite optimistic, we can observe weaknesses concerning its functioning. The technology and corporations that structure these cities cannot become spokespersons for deeper sociocultural dynamics. As the consumption of this new digital and urban space of smart cities occurs through access to information technology and connectivity, the articulation with the concept of "smart" naturalises and incorporates the term in several instances (smart economy, smart mobility, smart governance, smart environment, smart living and smart people; Vanolo & Lombardi, 2015) and depoliticises political choices. This set of pre-existing urban-technological imaginaries reduces complex social problems to simple problems, aiming at a quick and easy solution, often incorporated into the ideal of app-type technology (Morozov & Bria, 2018/2019).

One of the weaknesses of this logic based on the solution is related to citizens' effective participation in building a smart city. According to Simonofski et al. (2017), new technologies play an essential role in transforming cities. However, it is the way these technologies are applied that has the potential to make them smart for city dwellers. Theoretically, the innovative focus differentiates smart cities (investment in information and communication technologies) from traditional cities (investment in transport). Therefore, to improve the provision of public services and optimise their operating dynamics, it is necessary to identify the technical and technological mechanisms which enable or prevent citizen participation. In other words, we must recognise that smart cities demand a particular type of citizen.

Citizen empowerment is, for example, the object of programs such as the media and information literate (MIL) cities of the United Nations Educational, Cultural and Scientific Organization (2018). It is a program that understands the city as a catalyst for citizen empowerment and the use of technology as an ally in teaching and learning about urban life. According to United Nations Educational, Cultural and Scientific Organization

(Unesco), the MIL city concept encompasses three city projects: (a) the creative city, which has recognised and certified cultural practices; (b) the smart city, which emphasises the importance of connectivity (through information and communication technology) for the quality of life of its inhabitants; and (c) the sustainable city, which presents a balance between economic, ecological and social aspects. According to MIL laws (Grizzle & Singh, 2016), this implies educating, training, and empowering city dwellers (of all age groups and social classes) and the various actors participating in the construction and living process in the city. However, it is not an easy task, mainly due to the economic, social and cultural barriers that citizens and (public and private) organisations face concerning communication in the digital environment.

From the importance that technology acquires, the term "literacy" arises to designate the skills suitable for the 21st century. Although Unesco recognises that "the impact that emerging technologies and their potential convergence may have on each individual in the future, as well as on the communication and construction of knowledge societies, is not known" (Sayad & Bonami, 2019, p. 227), Unesco also understands the MIL program as a set of skills and competences for the exercise of citizenship, critical thinking and democratic participation in current times. However, it is necessary to consider that, in addition to the potential vulnerability of these systems designed to facilitate interaction, not all citizens are equal in terms of access or skills. This "digital gap" means that some citizens are able to participate more easily than others through information and communication networks.

The Brazilian context illustrates the consequences of this gap. At the same time as the federal government plans to digitise 100% of public services by 2022 (*Brasil Lança Sua Estratégia de Governo Digital para 2020 a 2022*, 2021), the *TIC Domicílios* (ICT Households) survey (Núcleo de Informação e Coordenação do Ponto BR, 2021) estimates that the number of internet users in Brazil reaches 152,000,000, which is equivalent to 81% of the population aged 10 years old and over. Although the result consolidates an improvement in access and is publicised with optimism, it also means that about 19% of the Brazilian population would be on the sidelines of a government digitisation project. The exclusion of elderly people is even greater. Only 50% of Brazilians aged 60 or over are internet users. Thus, there is a paradox here. Unless public policy succeeds in promoting digital inclusion, the city of the future might exclude precisely the age group projected to grow the most in the coming decades. In 2060, for example, one in four Brazilians will be 65 years old or older (*Projeção da População 2018: Número de Habitantes do País Deve Parar de Crescer em 2047*, 2018). In other words, the question is: are smart cities age-friendly?

To answer this question, we must verify the qualification of older people for this efficiency project based on technology. Digital inclusion is, however, only a part of this complex problem inherent to smart cities. In this sense, two distinctions should be made. The first one is between access and participation, from the perspective of Carpentier (2012). Access is the necessary condition for interaction and participation. Participation,

in turn, concerns empowerment and the ability to make decisions, including the possibility of promoting the interests and needs of social actors. The second distinction is between participation and involvement, from the perspective of Simonofski et al. (2017), while participation is related to citizens' activities, involvement corresponds to a psychological state of personal relevance.

Based on that, we propose the following analysis: we approach how the access of elderly people to the techno-informational-communication project of the smart city occurs, we verify whether this access enables the participation of elderly people and makes their interests and needs representative, to transform the city into a *smart* and age-*friendly* city, and we discuss whether this participation takes place through a sense of involvement, capable of recovering their status as a resource to society while providing them with a sense of usefulness. We situate the negotiations between access, participation and involvement in the Brazilian context focusing on the experience of a group of older adults in the city of São Paulo. Based on ethnographic findings, we then return to the hypothesis that smartphones — in the way older people appropriate them — "informally" structure an age-friendly city that is at the same time smart and accidental, as we will demonstrate.

3. Gap for Inclusion of Elderly People in the Smart City Project: The Brazilian Context

Smart cities often minimise citizens' participation in data gathered from their interactions with the city. These data would support decision-making and governance, focusing on optimising the city to respond to its inhabitants' needs. From this perspective, (reduced) participation is the result of the interaction with its digitized mechanisms. Even so, this "participation" presupposes an "interaction" made possible by "access" to a network of digitised mechanisms, which starts to mediate urban life. At first, we can propose access is the connection to this network. As previously discussed, internet access in Brazil reproduces the country's inequalities. Addressing social disparities, the number of households with access to the internet varies from 64% in class D/E to 100% in class A. Regarding education, 73% of Brazilians with elementary education are internet users; among users who have higher education, this index rises to 96%. In addition, there is also the age issue. Only 50% of Brazilians over 60 years old are internet users — the lowest percentage among all the age groups (Núcleo de Informação e Coordenação do Ponto BR, 2021).

This inequality also impacts the interaction through digitised mechanisms that mediate urban life and citizens' rights. During 2020, for example, the percentage of Brazilians who were internet users and accessed public services online was 15% in class D/E and 63% in class A. Among those with elementary and higher education, 15% and 68% respectively. Among Brazilians aged 60 and over, only 29% accessed this type of service. In the case of this age group, it also worth noting that 64% of internet users aged

60 and over have access exclusively via smartphones — the highest percentage among age groups over 15 years old (Núcleo de Informação e Coordenação do Ponto BR, 2021). Therefore, we must recognise the importance of the mobile experience in the interaction and participation of older people in smart cities and problematise it in terms of the usability of applications.

Morris and Murray (2018) propose that we live in an age of apps driven by the idea that if there is a problem (ordinary or not), there must be an app to solve it — whether it is a simple or a complex app such as the mega apps represented by Facebook or the Chinese We Chat. Every day and mundane issues are precisely what smart cities aim to solve in the urban context and what age-friendly cities aim to optimise in terms of the possibility of active ageing. Therefore, applications would be a solution for managing and a resource for planning. They can gather the data to understand the problem and improve the technology that aims to solve it. Let us take the city of São Paulo to illustrate this from the perspective of urban transport optimisation since it is essential to enable the access of older people to activities related to active ageing

Dwellers of São Paulo can choose SPTrans applications to recharge their *bilhete único* (single ticket), the card used to pay for public transport. Registration to have the single ticket provided by SPTrans became mandatory and can be made online (https://scapub.sbe.sptrans.com.br/sa/acessoPublico/novoUsuario.action). The CPTM application (CPTM, n.d.) is available for operational information. Regarding driver services through online platforms, it is necessary to download the app of the available players, such as Uber and 99. Also, residents can still choose shared transportation and travel by bicycle. One option is to rent Bike Itaú via the app — a partnership between Itaú Unibanco and the company TemBici. Another alternative is the car itself. In this case, the driving permit app, Carteira Digital de Trânsito (digital transit wallet; SP Notícias, n.d.) offers a digital version of the license. Finally, the Zona Azul Digital (digital blue zone) app is mandatory for payment of fees to park the vehicle in public areas.

The "appfication" of urban life and the digitisation of services has been even more accelerated due to the COVID-19 pandemic when social isolation restricted urban displacement. In this context, the federal government's emergency cash transfer program required the use of the Caixa Tem (Caixa has) app (Caixa, n.d.). Mandatory procedures to keep receiving social benefits — such as retirement benefits — have also become available online. In the city of São Paulo, the election of the Great Municipal Council had the option of online voting through the Participe+ platform, which aims to "provide an environment for the discussion and formulation of municipal public policies in a collaborative way between the population and the government" (Participe+, n.d., para. 1). Although some of these services can also be accessed through websites, in the case of internet users aged 60 and over, it is necessary to consider that access is exclusive via their smartphones for more than half of them. Therefore, websites and apps will result in a mobile experience for this age group.

Regarding the design of mobile interfaces, developers are criticised for disregarding the natural changes of ageing, such as cognitive, motor and sensory losses (Rocha & Padovani, 2016). Small types, inefficient use of colours and contrasts, few options to correct errors, too many features or steps to perform a task, difficulties entering and saving data, complex navigation, lack of clear instructions and feedback, and inaccurate information about privacy and data collection. All factors are associated with poor usability in old age.

We will expand the discussion on the consequences of these inadequacies for exclusion, considering the health area. Two factors justify this choice. Firstly, maintaining good health is essential for active ageing, which is the purpose of the age-friendly city. Secondly, the health sector and the cities have undergone similar transformations, such as the digitalisation of processes and the demand for new skills from users. In addition, it is worth mentioning that the idea that technology can automate processes (making them more efficient for the user) underpins both the cities and the healthcare system. We are, therefore, approaching the paradigm of telemedicine 2.0 with health ecosystems centred on an empowered patient, capable of seeking and managing information to make decisions about health, which can be seen as one's responsibility as a citizen (Swan, 2012). In this technological context (which includes, in the 2.0 perspective, resources such as artificial intelligence, machine learning, remote monitoring, wearables, applications and websites), the abilities related to health literacy (Kickbusch, 2001) are updated considering the digital, becoming a digital health literacy (Dunn & Hazzard, 2019).

In Brazil, telemedicine 2.0 was not widely regulated until the beginning of the COVID-19 pandemic. Practices such as teleconsultation and telemonitoring were approved on an emergency basis in March 2020 (Libânio et al., 2021). Many applications were developed or optimised in public and private spheres to provide health resources to the Brazilian population in the pandemic context. Even considering that the elderly people were the most affected by the coronavirus (Camarano, 2020), these initiatives were not designed for this specific age group. As explained by Libânio et al. (2021), elderly people — who could have benefited the most from the digitisation of these services — may have had their access or use of those resources limited by problems related to the digital divide, including the lack of skills to use digital technologies.

Regarding these skills, however, the issue of digital literacy has impacted the broader population. Since the pandemic's beginning, 20% of Brazilians have had medical appointments online (Barbosa, 2020). However, one of the reasons given by 50% of internet users who have not used the online resource was that this service was considered "complicated". The medical appointments online have shown an alternative to bypass the barriers to technology adoption, especially those becoming mandatory for the exercise of citizenship and urban life. It is, therefore, the messaging applications (WhatsApp and Telegram) that were used by 50% of Brazilians in teleconsultations, being the most used means for this purpose during this period.

Therefore, it is worth asking what the appropriation of a messaging application for obtaining health resources means and what is its potential for the digital and social inclusion of elderly people. Despite the growing number of Telegram users in Brazil, we must consider the importance of WhatsApp as a means of communication and information for the Brazilian population. In Brazil, WhatsApp is installed on 98% of devices. Of this total, 86% of users access WhatsApp every day; 74% of users take part in a group dedicated to the family; 76% of users access the app to communicate with businesses; and 61% of users make voice calls instead of calls from mobile operators (Mobile Time & Opinion Box, 2021, p. 16). Mobile operators even offered the use of WhatsApp as an unlimited service with no consumption of the data package contracted by the user (Cruz, 2018). In addition, 92% of smartphone users aged 60 and over access the app (Obst, n.d.).

The massive presence of WhatsApp on smartphones owned by Brazilians aged 60 and over is already a phenomenon under study. Connecting with family and friends is the primary motivation for using this technology among elderly people (Gonzalez & Katz, 2016). The same reason underlies messaging apps responsible for managing the communication with nuclear, extended and transnational families as well as being used for the distribution of daily tasks among family members (Nedelcu, 2017; Plaza & Plaza, 2019; Taipale & Farinosi, 2018; Webb, 2015). In the Brazilian context, WhatsApp is very likely to be the application that motivates the adoption of smartphones by elderly people, which also implies a learning process concerning this technology.

Our intention is not to highlight elderly's people's technological constraints but rather to verify what they can accomplish through WhatsApp (without downloading the various bespoke applications which now mediate urban life). The preferential use of messaging applications for teleconsultations by Brazilians, as previously explained, is a clear example of this process. Thus, the discussion we propose below focuses on the potential impacts of WhatsApp on the ageing experience in the city. We also consider whether WhatsApp alone would enable an accidental city, informally smart and age-friendly, with outcomes for health and participation. To this end, the following analysis considers the context of the city of São Paulo.

4. WhatsApp and the Aging Experience in the City of São Paulo

Analysis of WhatsApp's implications for the experience of ageing in the city of São Paulo is based on a 16-month ethnography. The first author conducted this ethnography in a middle-class district in the city's south between 2018 and 2019 (Duque, 2022). This neighbourhood has a wide range of activities aimed at the third age. These activities are linked to the active ageing framework. The first author followed the participants' daily routine by attending social events, a course on the use of WhatsApp and smartphones, meditation practices, pilates and yoga classes and became part of a group that discussed work alternatives for elderly people.

A WhatsApp group is usually created to support the activities aimed at the third age. Therefore, participant observation also contemplated these online spaces. In-depth

interviews were carried out with 38 participants aged between 50 and 76 years old. Participants were invited randomly during the face-to-face activities observed. In addition, they were able to indicate relatives and friends who used services for the third age in the neighbourhood where the research took place. The in-depth interview was structured in three parts, with questions about the experience of ageing in the city, health and smartphone use. Participation in the research was conditioned to accepting the free and informed consent form, approved by the Research Ethics Committee (CAAE 90142318.2.0000.5511).

In Brazil, although the age of 60 is the landmark for someone to be considered elderly, the research participants indicated that, when approaching 50 years of age, they were already treated as elderly people and victimised by ageism. In this sense, they claim that they live in "limbo": they are considered too old for the labour market and too young for retirement. Among retired participants, most believe that they retired early. The decision to retire was not based on the wish to enjoy free time but rather on rumours of a possible reform in the social security system — consolidated in 2019 (Temóteo et al., 2019). The lowest retirement age recorded among survey participants was 49 years old.

This early exit from the labour market was directly related to their use of technology. As an example, we can compare the experience of three participants: a 72-year-old man, who has been retired for 20 years, does not use banking apps and prefers to go to the bank in person; a 62-year-old woman, retired for 10 years, who uses exclusively banking apps; a 63-year-old woman retired for almost 3 years, uses banking apps and makes investments and international transfers via apps. The comparison is coherent if we consider that 20 years ago, access to free email accounts was widespread in Brazil (Karasinski, 2009) and that the consolidation of social networks (such as Facebook) occurred in the past decade. Therefore, the workplace emerges as a factor that facilitates the adoption of this type of technology, mainly because it is the place where technology would be available first with no cost for employees and with applied demands that could make its adoption and learning more accessible. In this perspective, for the research participants, early retirement is an event that triggers the process of digital exclusion.

Outside the labour market, other reasons motivate participants' interest in smartphones. As explained earlier, the use of smartphones is stimulated by the wish to reconnect with family and friends — which, in this context, means adopting WhatsApp to join the conversation. Courses on how to use WhatsApp aimed at the third age are the most popular among participants. The first author of this article took part as a volunteer teacher in one of those courses during three semesters. During this period, it was possible to map several learning barriers. The first of them is the psychological one. Students arrive at the course with low self-esteem, aggravated by ageism. This type of prejudice even occurs on the part of their children, who are unavailable to help them. Their lack of patience is why they seek "professional help". In addition, many of them believe they are too old to

learn, even though they start the course with WhatsApp already installed on their smartphones (the download is usually made with the help of family members or friends).

From the experience of these students, it was also possible to verify the inadequacy of application interfaces for this age group. Font size, contrast, lack of guidance on commands, lack of feedback on actions and motor difficulties could be observed during the learning process. The device itself can be an issue for restricting their access and usage. Participants had second-hand smartphones, which usually had storage and battery problems. This exacerbates the issue of self-esteem because the limitations of the device were internalised as personal failures or inabilities by the students. The last issue was the memory. All students used paper to create lists and memorise the steps necessary for actions on WhatsApp. This tactic does not lead to emancipation or digital literacy since students completed the course only knowing how to repeat steps. Most of them failed to replicate the logic learned on WhatsApp to other applications.

Even so, in terms of participation, as Carpentier (2012) proposed, access to WhatsApp groups enables the promotion of interests, the debate on needs and evaluation — for example, recommendation, criticism or boycott — of policies, products and services aimed at the third age. These WhatsApp groups function as forums, also a smart city feature. Participation in these networks promotes the selection of service providers and urban life optimisation.

In addition, among participants, the free time associated with retirement is seen as uselessness or denotes character flaws. That is the reason why, when retired, participants take part in various activities aimed at third age. With their schedule full of commitments, they reproduce their work routine until they can socially present themselves as productive citizens of São Paulo. Participation in WhatsApp groups as content curators can also help participants present themselves as active persons. Their work as curators is visible to other people, proving that they remain active as citizens and are part of an active ageing project (Duque, 2021b). However, the work of a "curator" can be problematic. If, on the one hand, sharing information considered helpful by the group can generate social capital, on the other hand, this social capital is highly disputed. Thus, it can lead to the dissemination of fake news.

The ability to identify fake news is related to the issue of digital literacy as the ability to process, judge and elect reliable content online. When it comes to medical information, participants tend to avoid online searches because they could not choose reliable results. This finding allows us to question the model of autonomy advocated by telemedicine 2.0 and, at the same time, highlight the distinction between an informed citizen and an empowered citizen concerning health management (Santana et al., 2011). Furthermore, applications developed to facilitate access to health resources in public and private health systems could provide professional advice and compensate for that. However, when they want to schedule an appointment, participants generally prefer to leave these applications and access websites (when available), call or go to health

facilities in person. The functionalities offered by the applications are reduced to the use of the user's digital identification card, presented during consultations.

An alternative would be to make professional advice available on WhatsApp. Even before teleconsultations regulation in Brazil, more than 80% of physicians in the state of São Paulo declared that they had already used technologies to assist patients (Collucci, 2019). In addition, 78.69% of them favoured using WhatsApp (Felix, 2018). However, participants perceive that contact via WhatsApp is only made available by private doctors and not by those who work in the public health network or for health insurance plans. It does not mean that participants do not use WhatsApp to obtain medical information. Indeed, they turn to their network available on WhatsApp groups for medical support, where they look for friends they know who work in the healthcare area. By doing this, they can receive informal guidance (based on friendships) and reliability (provided by a healthcare professional).

Requests like those expand the functionality of WhatsApp groups because they structure a network of favours that generate impacts both for autonomy and participation. Friends can make them download new apps, assist in obtaining an online service, or follow up on a medical appointment. In addition, participants can use these connections to overcome bureaucracy and get preferential health care (in the public or private health system), which is related to the "Brazilian way". This practice is rooted in the culture and based on favours obtained from relationship networks to deal with bureaucratic difficulties (Prado, 2016).

These favours are granted among older people based on reciprocity, producing a cycle of exchanges that structures social bonds — as if it were an exchange of gifts (Mauss, 1960/2003). WhatsApp enables a circle of exchanges when participants commit to meeting their peers' needs. In this context, responding to a friend's request on WhatsApp means keeping a positive balance in the bank of favours that also sustains a network of solidarity crucial for the experience of ageing in the city.

In addition to informally collaborating to prevent and maintain health in old age, the WhatsApp network also enables participants to care for elderly parents. Intergenerational care is another component of the active ageing framework, which proposes the role of preferential caregiver of family members as one of the ways to participate in and contribute to society (World Health Organization, 2002). WhatsApp connection is also a resource for prolonging autonomy, especially for elderly parents who live alone. This connection compensates for the distances and difficulties of moving around the city. Children can monitor elderly parents through the app when the overlap between surveillance and care is observed.

In Brazil, social isolation became compulsory from the beginning of preventive measures against the COVID-19 pandemic. This policy lasted until the vaccination of the elderly population, which took place in 2021. In this context, even with the interruption of face-to-face activities aimed at the third age in the city of São Paulo, WhatsApp

groups remained active. These groups served to exchange health information and as a resource for maintaining social ties during isolation. However, WhatsApp does not solve the problem of access to digital services available in other platforms or applications (the pandemic has accelerated the digitalisation of services even more). On the contrary, based on participants' experience, this access may have been hampered by isolation as they usually ask relatives or friends for help to download or set up applications.

Although limited, we should highlight the benefits that the network structured by WhatsApp groups generated for participants before the pandemic. In other words, it is necessary to recognise the impact of this network on digital inclusion and its potential to grant an experience of involvement and a sense of belonging as citizens. From this potential, an accidental city emerges between two city projects: the *Age-friendly City* (which favours active ageing) and the *Smart City* (whose network aims to optimise resources to respond efficiently to the needs of its inhabitants). Based on this third city, we will make our final notes on older people's empowerment for participation (albeit centred on WhatsApp).

5. Final Notes: The Accidental City

Pype (2017) approached the official discourses about smart cities in the Democratic Republic of the Congo. Far from the Congolese call for progress, she argues that this western imaginary of smart cities (operated by wireless technologies, with highly connected service and communication networks) appears out of step with the reality of African urban centres. From her ethnography in Kinshasa, the anthropologist coined the term "smartness from below" to address all the creativity and (formal, informal and immoral) knowledge employed by the Congolese in overcoming the limitations of urban infrastructure to engage with technology daily and turn their reality into a "smart" experience if the city.

This "smartness from below" is the same observed in the group of older adults from a middle-class neighbourhood in the city of São Paulo, especially concerning their appropriation of WhatsApp. In this case, their limitations are not restricted to connection alone, but also encompasses the skills needed to enable their access and engagement with platforms that structure (based on algorithms, websites and applications) the participatory processes in the city. In that perspective, technologies increasingly mediate the practices of those we call "citizens", "consumers" or "users", and those no longer represented in this project (Canclini, 2019).

This participation, which would be unfeasible by the lack of digital literacy, is what WhatsApp enables in terms of outputs. However, the platform does not solve the digital exclusion from the institutional channels created to provide access to health, transport, citizenship and consumption in general. Participants compensate for that by creating an alternative informational network shown to be equally efficient in its impacts for active ageing in the city. They are protagonists in this network, whether in terms of curating helpful information to improve the ageing experience or exchanging favours that

overcome digital and bureaucratic barriers, enabling new forms of care and autonomy. It is for this network that they work. By doing this, they also recover their productivity and dignity, which can promote a sense of belonging as citizens of the city of São Paulo.

This city of São Paulo — discussed, edited, shared and made visible, taking into account older people's interests — was not anticipated either in the project of an age-friendly city or in the scheme of a smart city. Instead, it is an accidental city that emerges where neither of these projects fully succeed. Despite this, the accidental city solves the same challenges, making the experience of ageing more intelligent and friendly. Thus, learning from the accidental city and its "smartness from below" can be a way to minimise barriers to adopting new technologies by older people and optimise resources that aim to promote health, participation, and autonomy. An example was the group "WhatsApp Solidário" (solidary WhatsApp), created by the Coordination of Policies for the Elderly of the Secretariat of Human Rights and Citizenship of the city of São Paulo in March 2020. This group sought to face the harm caused by social isolation arising from the pandemic. Because this initiative was developed on WhatsApp, it was implemented in 7 days. From the start, 200 elderly adults took part in it, having online access to physical, educational and recreational activities and receiving psychological support (Gomes, 2021).

This article aims to contribute to the problematisation of older people's digital and social inclusion and highlight the opportunities to explore the digital resources already in use by this age group. In the Brazilian context, this resource is WhatsApp. Even so, we recognise the challenge of educating older people in Brazil for the digital literacies involved in online and offline practices, which are necessary for democratic improvement. It is the only way the urban environment can work as a privileged place for citizen actions.

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Authors' Contribution

Marília Duque carried out the investigation and formal analysis. She contributed to the conceptualisation, writing – original draft and writing – review and editing. Adriana Lima de Oliveira contributed to the article's conceptualisation, formal analysis, writing – original draft and writing – review and editing.

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Changing Perspectives: The Role of Creative Industries in Social Innovation Projects to Empower Local Communities

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Abstract

The COVID-19 pandemic has affected the notions of social life as we know them, so it is important to develop and mediate projects that meet the contexts of great social transformation we live. The COVID-19 crisis also affected rural areas that have sought to control rural exodus. However, new opportunities emerged for rural territories as the world adapted to the pandemic. In the central region of Portugal, the Association for the Integrated Development of the Mountain Villages Network, through its *Mountain Villages* project, seeks to promote the regional development of these cultural territories. For this purpose, it has been developing social innovation projects with enormous potential for the region's social, economic, and cultural development. The association has begun creating two social innovation projects essential in developing the communities located in the Mountain Villages: the *Queijeiras Project* and the *Cooperativa Coworking Spaces @Mountain Villages*. This article presents both projects and emphasizes the importance of practices that lead to the positive development of society through the convening of creativity and creative industries in social innovation projects. The professional work and fieldwork carried out at the Association for the Integrated Development of the Mountain Villages Network and the Mountain Villages territories frame the study conducted, as do interviews and questionnaires with people and entities linked to the projects. The results presented in the article demonstrate how both projects are extremely valuable to understand the importance of building possibilities for the reinterpretation and empowerment of local communities that are often neglected. Furthermore, they also reveal an expansion from the local to the global, that is, an interaction of global environments with local cultures, creating an intercultural space so important in our globalized world.

Keywords

local communities, social development, creative industries, social innovation, empowerment

Mudando Perspetivas: O Papel das Indústrias Criativas em Projetos de Inovação Social Para Empoderar as Comunidades Locais

Resumo

A pandemia da COVID-19 afetou as noções de vida social tal como as conhecemos, pelo que é importante desenvolver e mediar projetos que vão ao encontro dos contextos de grande transformação social em que vivemos. A crise causada pela pandemia também afetou as zonas rurais que têm procurado controlar o êxodo rural. No entanto, surgiram novas oportunidades para os territórios rurais à medida que o mundo se começou a adaptar à pandemia. Na região centro de Portugal, a Associação de Desenvolvimento Integrado da Rede das Aldeias de Montanha, através do seu projeto *Aldeias de Montanha*, procura dinamizar a promoção destes territórios culturais. Para o efeito, tem vindo a desenvolver projetos de inovação social com enorme potencial para o desenvolvimento social, económico e cultural da região. A associação criou dois projetos de inovação social essenciais no desenvolvimento das comunidades localizadas nas Aldeias de Montanha: *Projeto Queijeiras* e *Espaços Cooperativa Coworks @Aldeias de Montanha*. Este artigo apresenta ambos os projetos e sublinha a importância das práticas que conduzem ao desenvolvimento positivo da sociedade através da convocação de indústrias culturais e criativas em projetos de inovação social. O trabalho profissional e o trabalho de campo realizado na Associação de Desenvolvimento Integrado da Rede das Aldeias de Montanha e dos territórios das Aldeias de Montanha enquadram o estudo realizado, assim como entrevistas e questionários com pessoas e entidades ligadas aos projetos. Os resultados apresentados no artigo demonstram como ambos os projetos são extremamente valiosos para entender a importância de construir possibilidades para a reinterpretação e capacitação das comunidades locais que são muitas vezes negligenciadas. Além disso, também revelam uma expansão do local para o global, isto é, uma interação de ambientes globais com culturas locais, criando um espaço intercultural tão importante no nosso mundo globalizado.

Palavras-chave

comunidades locais, desenvolvimento social, indústrias criativas, inovação social, capacitação

1. Introduction

The COVID-19 crisis was initially seen as a challenge for rural areas. However, adapting to the pandemic sprung new opportunities for rural territories. The current global context led to the creation of two social innovation projects, employing creativity and elements of the creative industries, leading to the empowerment of local communities.

This article seeks to demonstrate how the *Queijeiras Project* and *Cooperativa Coworking Spaces @Mountain Villages*, as cultural and social creative interventions, have important roles in developing and disseminating a given geographic context. The first part of the article presents a literature review about the social innovation projects' use of creativity to empower local communities. The following two subsections describe the Association for the Integrated Development of the Mountain Villages Network (Adiram) and Mountain Villages. Subsequently, two social innovation projects, *Queijeiras Project* and *Cooperative Spaces-Coworks @Mountain Villages*, are analyzed. Finally, the last section presents the conclusions.

2. Literature Review

2.1. Positive Development of Local Communities: Creativity As a Key Point

The positive development of local communities requires the employment of strategies. Creativity has appeared as a key point to that development in recent years. Creativity is a mental ability and human behavior. It is influenced by various social, developmental, and educational experiences (Andriopoulos, 2000; Runco & Sakamoto, 1999). This literature review attempts to give a broader account of the various definitions of the term.

According to Arthur Cropley (2011), we can use the word "creativity" in three ways:

> it refers to a set of processes (e.g., "creative" thinking), a cluster of personal characteristics of people (e.g., the "creative" personality), and to results (e.g., a "creative" product). Thus, creativity is treated as both a cause (e.g., creative processes yield products; peoples' creativity causes them to behave in a certain way) and also as an effect or result (a certain kind of product resulting from person and process). (p. 512)

Modern research about creativity has its origins in 1950, when J. P. Guilford (1950), in his presidential address, called the attention of the American Psychological Association to focus on this area.

Creativity includes two dimensions. The novelty notion considers it an everyday phenomenon and assumes that anyone can be creative. It is regarded as something essential for the person to contribute to the business environment, but this notion also believes that everybody should be involved in creative processes. The second dimension, related to the usefulness notion, refers to the material or practical methods of assessing the usefulness of new ideas (Shalley et al., 2004).

Creativity involves two principles: problem finding and problem-solving. That is essential because creativity is able not only to generate new ideas or to increase efficiencies but also to solve complex problems (DiLiello & Houghton, 2008). Besides, understanding creativity is important because it is extremely relevant for us to recognize the industry that carries its name: the creative industry.

2.2. Creative Industries and the Growth of the Creative Sector

The 1990s, especially in Australia and the United Kingdom, saw the origins of the concept of the creative economy, leading to the introduction and use of the term "creative industries" in policy development circles. According to the United Kingdom government's Department for Culture, Media and Sport (2001), "creative industries are those industries that have their origin in individual creativity, skill and talent that have the potential to create employment and wealth through the generation and exploitation of intellectual property" (p. 5).

In many regions, the creative sector is growing rapidly. Creative economy and the creative industries retain several qualities useful from the point of view of local

development, namely their potential for social development and the inclusion of the entire community. In this way, creative industries are more than ever a key input for businesses and public authorities to publicize their territory.

Nowadays, as the United Nations Educational, Scientific and Cultural Organization (2021) website states, "the creative economy has also gained significant traction as a lever for local sustainable development, particularly over the past two decades" (para. 6). The creative economy's potential for sustainable development has grown throughout the years, including aspects of public policy agenda, such as economic growth, education and skills, social inclusion, ecological transition, and social innovation and citizenship (United Nations Educational, Scientific and Cultural Organization, 2021).

2.3. Social Innovation: Summoning Creativity and the Creative Industries

The COVID-19 crisis worsened the complex social, economic, and environmental contexts with which the world was already being challenged. The concept of social innovation appears as a new means to address such issues, working as a sustainable solution (Howaldt et al., 2015, p. 29). Using sustainable strategies and innovative approaches, we help to preserve the landscape as cultural heritage (Lekic & Milovanovic, 2018).

The concept of social innovation is commonly referred to as "new ideas that work in meeting social goals" (Mulgan et al., 2007, p. 8). That is a wide definition of the term. Mulgan et al. (2007) also refer to social innovation as "innovative activities and services that are motivated by the goal of meeting a social need and that are predominantly developed and diffused through organizations whose primary purposes are social" (p. 8).

Nicholls et al. (2015) pointed out two interlinked conceptualizations of social innovation. According to them, the first is related to changes in social relations, focusing on readjusting power disparities created by economic inequalities in society (Mehmood & Parra, 2013). The second conceptualization presents social innovation as a response to social market failures in providing vital public goods (Nicholls et al., 2015).

In addition, Manzini (2014) unravels the concept of innovation and emphasizes:

> Social Innovation is a process of change emerging from the creative recombination of existing assets (from social capital to historical heritage, from traditional craftsmanship to accessible advanced technology), the aim of which is to achieve socially recognized goals in a new way. (p. 57)

Here, creativity in social innovation is advanced as a crucial factor in creating innovative things.

2.4. Empowering Local Communities: Using Elements of the Creative Industries in Social Innovation Projects

Another concept appears when we describe the concepts referred to before: the concept of empowerment. Empowerment can be seen as an outcome of processes aimed at

undoing negative social constructions so that people, in this case, residents, can understand how they can influence their surroundings. Rappaport (1987) describes empowerment as "a process, a mechanism by which people, organizations, and communities gain mastery over their affairs" (p. 122). Empowerment can be divided into several types: psychological, social, political, economic, and environmental (Strzelecka et al., 2017).

Empowerment is essential and plays a pivotal role in community development. Through it, people obtain the ability to become more aware of their interests, having the possibility to make part of the discussion. In this case, the local communities, often neglected and which usually stay outside the decision-making process, gain a voice (Strzelecka et al., 2017).

When put into practice, all the concepts referred before can help empower local communities and lead local identities to collide with global flows, bringing the concept of "glocal".

2.5. "Glocal" As a Hybrid Space to Push Limits

The interaction between global cultural flows with local environments results in the "glocal". According to *The Oxford Dictionary of New Words* (1991, as cited in Robertson, 1995), the term "glocal" and the process noun "glocalization" are:

> formed by telescoping global and local to make a blend; the idea is modelled on Japanese dochakuka (deriving from dochaku "living on one's own land"), originally the agricultural principle of adapting one's farming techniques to local conditions, but also adopted in Japanese for global localization, a global outlook adapted to local conditions. More specifically, the terms "glocal" and "glocalization" became aspects of business jargon during the 1980s. By now it has become (...) "one of the main marketing buzzwords of the beginning of the nineties". (p. 28)

Different influences interconnect with the application of global concepts to local cultural territory, creating space for something new, subversive, creative, and innovative. Following this line of thought, Adiram, with the project *Mountain Villages*, used social innovation projects combining local and global aspects. In this way, such projects help nourish and develop the cultural territories and the communities of Serra da Estrela and Serra da Gardunha.

These projects keep the traditions and identity of the villages but use and practise them with the help of globalized and technological sources. This connection creates a hybrid space at the junction of a local environment with global influences. A hybrid space that pushes limits creates change and opens new spaces for local communities' social and economic development.

3. Methodology: Joining Practice With Theory

To create this article based on the case studies of Adiram and the project *Moutain Villages*, it was used qualitative data. The article focuses on the description of the activities developed at Adiram and on the association's work and projects, including creating social innovation projects summoning elements of the creative industries to develop the Mountain Villages' local territories and communities.

To better address the issue, one of the authors developed professional and fieldwork at Adiram. Her professional experience began on February 15, 2021, and ended on June 11, 2021, while doing her curricular internship in the association. During that time at Adiram, she developed several tasks, such as creating databases, social media management, translation and text revision, and fieldwork, mainly through press trips. Additionally, she helped create one questionnaire for the *Queijeiras Project*, presented below. She was also able to work with the coworking spaces project, *Cooperativa Coworking Spaces @Mountain Villages*, which will be analyzed in some of the following sections and subsections.

Additionally, she used theoretical research to frame her professional experience at Adiram and better address the issues established throughout the paper. In terms of bibliographic research, it was used especially Google, Scielo, and EBSCO repositories, books, and documents from the Porto Accounting and Business School library and the library of the Center for Intercultural Studies.

The professional experience achieved in the association, the fieldwork in the Mountain Villages, and the contact with professionals and the local communities linked with the academic research developed led to the descriptions made in this article.

3.1. The Association For the Integrated Development of the Mountain Villages Network

The first step towards creating a network to develop the territory of Mountain Villages was taken on April 22, 2012. Adiram was established and registered at Seia notary's office (Associação de Desenvolvimento Integrado da Rede das Aldeias de Montanha, 2012). The association's headquarters are currently located at Serra da Estrela Interpretation Center.

The main goal of Adiram is to promote the integrated and touristic development of the Mountain Villages network as a brand that aggregates the tourist potential of the region of Serra da Estrela and Serra da Gardunha through sustainability, innovation, and creativity.

3.2. The *Mountain Villages* Project

Following the creation of Adiram, the *Mountain Villages* project was created to value the unique endogenous characteristics of Serra da Estrela and Serra da Gardunha. Mountain Villages is a group of villages located in the center of Portugal, under the scope

of Tourism Center of Portugal, between the Serra da Estrela Natural Park and the Serra da Gardunha Protected Landscape.

These Mountain Villages are distributed over nine municipalities: Covilhã, Seia, Guarda, Manteigas, Celorico da Beira, Oliveira do Hospital, Gouveia, Fundão, and Fornos de Algodres. The project combines three axes: nature, people (tradition, culture) and gastronomy.

The work developed by Adiram in the Mountain Villages territories has generated employment. It has led to the assertion of these cultural territories as a national reference both in environmental and sustainable terms (Associação de Desenvolvimento Integrado da Rede das Aldeias de Montanha, 2012).

4. Analysis

The search for the positive social, economic and cultural development of the Mountain Villages led to social innovation projects to empower and develop the communities of the Mountain Villages: *Queijeiras Project* and *Cooperative Spaces-Coworks @ Mountain Villages*. They represent an innovative way to transform and regenerate the analyzed territories, building possibilities and empowering the local community.

The first project, *Queijeiras Project,* is related to empowering the female community of the Mountain Villages through traditional knowledge, arts, and crafts. The second project, *Cooperative Spaces-Coworks @Mountain Villages,* is linked to the empowerment and development of the community through the creation of coworking spaces, thus, creating a new type of visitor, the digital nomad, but also developing several activities in which the members of the communities can participate.

4.1. Empowerment and Recognition: The Specific Case of the *Queijeiras Project*

The *Queijeiras Project* aligns the innovation and entrepreneurship strategy of the Mountian Villages network action plan, integrated with the *Experimentation Villages of Knowledge Hub* under the PROVERE iNature Collective Efficiency Strategy co-financed by Centro 2020. The project was launched on March 27, 2021. The *queijeiras* (women cheesemakers) of Serra da Estrela are responsible for one of the region's most traditional and sought-after product: cheese (https://queijeiras.pt/). Thus, they play an important role in that territory's social, cultural, and economic development.

However, nowadays, and in all sectors of society, some women still do not receive the personal and professional recognition they should, despite their unique and fundamental role. That has been happening with the women cheesemakers for several years. These women deserve a protagonist role in this success story. Hence, to value their art and knowledge, the decision was made to develop a special project to recognize the work of the extraordinary women responsible for this globally recognized product.

As the Queijeiras website states:

> this is a project for women, carried out by women. It will benefit (at least) 40 *Queijeiras* from 9 municipalities, but we have the ambition to increase this number. The *Queijeiras* project arises to honor these women and contribute to their personal and professional development. (Queijeiras, n.d.-d, para. 5)

The way chosen to create the project consists of three steps (Queijeiras, n.d.-d). The first one corresponds to the design of an exclusive burel cape, representing the boldness of innovation. The second one involves content production, the creation of a book to celebrate tradition. Finally, the last one includes the training of soft skills to allow knowledge sharing.

4.1.1. Honoring Through Design: The Burel Cape

As part of the cultural and creative industries, the design brings recognition to women cheesemakers. The first step was the design of a cape by designer Sandra Pinho.

Creative design is expressed in several ways by creating unique decorative items. Design products are usually aesthetic, but they also fulfill a function based on concepts and specifications. Creative designs fit into the "functional creations" category that United Nations Conference on Trade and Development defined for creative industries (United Nations Conference on Trade and Development & United Nations Development Programme, 2010):

> it is the result of creativity expressed as a knowledge-based economic activity, which produces goods or services with creative content, cultural and economic value and market objectives. As such, the design industry is part of the creative economy given that it cuts across the artisan, manufacturing and services components of the value chain, interacting with technology and qualifying for IPRs (Intellectual Property rights). As an artistic work, design is associated with copyrights and specifically with "design rights" although the delimitation between the artistic expression and the industrial manufacturing is not evident. Certainly, without design, most goods and services would not exist or would fail to be differentiated in the marketplace. (pp. 155–156)

The inspiration for the design of the burel cape came from the values and identity of the *queijeiras*, leading to the creation of a cape made of burel, another of the noble products of the Serra da Estrela territory, an exclusive design piece produced with the support of the Burel Factory. Burel also has the power to give a voice to minorities. In a written interview with the Burel Factory representative, Romeu Lebres stated that burel "has always represented a minority: a culture from an interior region of the country that was, until now, deprived of a voice". Now, with the association of the burel factory with the *Queijeiras Project*, it can give voice to these hardworking and talented women.

The cape is called "queijeira", and it was drawn from the circle, the simple shape of the cheese. Creativity is represented in the shape of the cape and its color. The cape can be bought in different colors. Each one represents an expression of personality and is associated with a different attribute: from serenity to strength, from wisdom to determination, each *queijeira* is unique (Queijeiras, n.d.-a). The sales of the cape will provide tools to empower the women cheesemakers personally and professionally.

4.1.2. Creating a Larger Audience: Television As a Means of Dissemination

Television has been used to disseminate the *Queijeiras Project*. Interestingly, two of the soap operas that were recently broadcasted on the Portuguese national television channels TVI and SIC (*A Serra* [The Mountain] and *Bem Me Quer* [Wish Me Well]) were recorded in the region of Serra da Estrela.

According to the written interview made to SP Televisão in 2021, "the choice of the location for filming the soap opera was a decision SIC made months before the first lockdown, clearly driven by the unique beauty of Serra da Estrela, transversal to all seasons of the year".

The soap operas highlight the local culture and traditions of Serra da Estrela. The figure of the woman cheesemaker, *queijeira,* is notoriously central. The female protagonists of both soap operas are women cheesemakers, which is extremely important for the recognition of this profession. In the SIC's soap opera *A Serra*, the production of burel, the material that makes the *Queijeiras Project*'s capes, is also highlighted through a burel factory, where some of the members of the community work.

This interaction between fiction and reality has benefited both parties. On the one hand, the soap opera, the television channels, and the producer gain from filming on set in a place of such rich landscapes and traditions, adding dynamism to the story and expanding the possibilities of unfolding the plot. On the other hand, the products and the tourism in the region gain more visibility while the soap opera is exhibited. It is a win-win situation.

In this case, the audiovisual field of the creative industries is represented through television. According to the United Nations Conference on Trade and Development and United Nations Development Programme (2010):

> audiovisuals are one of the most complex, politically sensitive and underestimated subgroups among the creative industries, as well as one of the engines of the creative economy (...). Television is among the most popular creative industries, in a phase of technological shifts from the analogue to the digital system and from terrestrial to satellite and cable stations cable stations. (pp. 149–151)

On July 9, 2021, to celebrate the occasion of the 100th episode of the soap opera *A Serra*, SIC television show *Casa Feliz* (Happy House), presented by Diana Chaves and João Baião, decided to broadcast what best characterizes Serra da Estrela and its communities:

shepherds, cooks and some of the women cheesemakers from the *Queijeiras Project* were invited, among others the executive secretary of Adiram and coordinator of *Mountain Villages*, Célia Gonçalves and three cheesemakers, Graciete Marques, Célia Silva, and Paula Lameiras participated in the program to publicize the innovative project, as well as the capes in honor of the women cheesemakers. At the end of the program, the presenter Diana Chaves was invited to be one of the project's ambassadors.

On August 22, 2021, on the TVI program *Somos Portugal* (We Are Portugal), filmed in Oliveira do Hospital, the *Queijeiras Project* was also on show. The cheesemakers Paula Lameiras, Judite Pinto and Vera Moura, and the presenters Mónica Jardim (another of the project's ambassadors) and João Montez presented the project and the magnificent burel capes.

This visibility created by the audiovisual field of the creative industries, in this specific case by television, works as an extraordinary means of disseminating the project. In this way, it builds new possibilities to expand the project by calling the attention of a larger audience.

4.1.3. Perpetuating History and Traditions: The Creation of *As Guardiãs da Montanha*

The book *As Histórias das Guardiãs da Montanha* (The Stories of the Guardians of the Mountain) was created to perpetuate the women cheesemakers' history and traditions. That is also a powerful way to preserve the project and the testimony, history, traditions, and knowledge of these women, so the future generations never forget their know-how.

Once more, creative industries are employed here, in this case through a book and the use of storytelling. It is about recognition but also empowerment. Through the book, it will be possible to value that art and perpetuate centuries of know-how materialized in a product no one will remain indifferent (Queijeiras, n.d.-c).

Before the book's launch, it was important to find a way to know these extraordinary women. Thus, a simple way to start was by creating a questionnaire that they could fill in with their personal information. It was very helpful to get more information about them before the book's authors could interview women cheesemakers through a questionnaire to find out information about them and their work.

We understand that these women live simple lives and love what they do through the questionnaire answers. However, they acknowledge that their work has not received proper recognition. It is also noticeable that so many women cheesemakers have already accepted the challenge of participating in the project because they feel that it will help to empower not only their work but also themselves as women.

The goal of offering a mentoring course to the women involved in the project is an extraordinary way of personally and professionally empowering these women. As the project's website states:

> a course like this is a precious lever for these women to become aware of their enormous personal and professional power and value. As guardians of ancestral wisdom, they will be able to incorporate into their daily lives more creativity, innovation, and the ability to make their dreams and ambitions come true. (Queijeiras, n.d.-b, para. 2)

The opportunity to acquire new leadership and management skills is fundamental to empowering these women. There is no doubt that this is a dynamic project that links knowledge and flavors to design, fashion, and female empowerment (Rolo, 2021).

4.2. Coworking Spaces to Empower Communities and Attract Digital Nomads

The narrative of rural telework, or the idea "that information technology makes it possible to live and work in a healthier and quiet environment, rather than in busy and overpriced cities", was revitalized by the COVID-19 crisis (Clark, 2000, as cited in Berbegal-Mirabent, 2021, p. 2).

During the past decade, the businesses and individuals' adoption of green practices led to more sustainable living and work. Within this context, there was an increase in the creation of shared office space worldwide. Such spaces are generally mentioned as coworking spaces. As Berbegal-Mirabent (2021) points out, "these are collaborative environments which are found to feed innovation and creativity" (p. 1). Spinuzzi (2012) calls this new trend "working alone together".

Coworking spaces belong to the wide category of "third place", as makerspaces or libraries, digital public access points, small exhibitions, art performance venues, cafés, and restaurants, especially in single-household buildings with larger indoor space (Oldenburg, 1989). Besides, these spaces allow the performance of a broad spectrum of activities that include receiving workers to do telework or business meetings and several cultural activities, such as creative school activities, artist residencies, art exhibitions, live music performances. Although the main goal of coworking spaces is to attract digital nomads, the activities mentioned above meet the expectations of local authorities who also regard those spaces as creative, economic, and social development hubs.

4.2.1. The Effects of COVID-19: New Opportunities for Coworking Spaces

The COVID-19 pandemic and the lockdown measures, first implemented in spring 2020, led to an outburst of digital services and remote working (or telework), which indirectly increased the attractiveness of the countryside. Workers worldwide were obliged to work from home and all public venues closed. The future for coworking spaces was not that bright at this time. However, when the world began to adapt to the global pandemic situation, new opportunities for rural coworking spaces emerged.

Nowadays, the trend of coworking spaces includes their widespread diffusion to rural communities and small cities, thus, changing the long-time perception that they were an urban phenomenon (Moriset, 2014).

This shift resulted mainly from the pandemic situation we live in and the easiness of connecting through the internet in the professional world. Physical space is no longer a constraint. For this reason, more and more people who are currently forced to do remote online work are looking for a better quality of life that involves moving away from large urban centers, in search of greater contact with nature (Associação de Desenvolvimento Integrado da Rede das Aldeias de Montanha, 2020).

Tomaz et al. (2021) point out that:

> remote work is also predictable to remain at a fairly high level, as several workers experienced the benefits of working away from large urban areas during the COVID-19 period, and many companies are rethinking work arrangements to cut real estate costs. (p. 12)

Consequently, it is important to continue implementing coworking spaces since the number of digital nomads is also expected to grow in the coming years (Tomaz et al., 2021).

4.2.2. *Cooperative Spaces-Coworks @Mountain Villages* Project

Cooperative Spaces-Coworks @Mountain Villages are an innovative way of creating a dynamic offer, thus activating the experience of the village where they are situated.

The project established the creation of several coworking spaces in the territories of the Mountain Villages. Currently, eight coworking spaces have been designated in the Mountain Villages: Alvoco das Várzeas, Videmonte, Alpedrinha, Lapa dos Dinheiros, Cortes do Meio, Folgosinho, Rapa, Algodres. Some have already been approved and are now open, and others are still undergoing procedures, execution proceedings, or waiting to be approved.

As the document *Aldeias de Montanha-Cowork* from Adiram (Associação de Desenvolvimento Integrado da Rede das Aldeias de Montanha, 2020) points out:

> using regional resources, such as the artisan's labor, or the piece of handicraft produced in the region, or re-using end-of-life objects, recycling them, or restoring them, makes this a Project with a strong ecological component, importing concepts such as eco-design and circular economy. These are spaces that have their own identity. They are creative spaces for enterprising and creative people looking for a better life, a quieter life, without losing productivity and relationships with other peers, with whom they can exchange ideas and experiences. It is a space for cooperation and interaction. (p. 2)

In this description, the local with the global interact through the creative industries. There is a full architectural and landscaping use of coworking spaces. The room design

and elements are taken from the local community's culture. There is a shift from cultural practices to a broader perspective of technology and globalization.

The first step is to renew previously abandoned or unused local culture houses. They are decorated with traditional products characteristic of the local culture.

This traditional decoration is combined with all the conveniences of globalization, for instance, internet access, printing facilities, among others, thus calling on other economic areas. That creates a link between local and global, which is intensified by disseminating these spaces on websites and social networks, making it possible to attract people from all over the world.

The project enhances the concept of cooperation and collaboration in a common and shared space that allows interaction and exchange of ideas and experiences. In other words, it seeks to offer its users the opportunity to work in an innovative, inspiring, and unusual space.

5. Conclusions

In contexts of social change like the one we live in caused by the COVID-19 pandemic crisis, it is important to create practices that allow us to adapt to new situations that may arise. In order to make transitions and build new possibilities to reinterpret the new realities, it is important to develop projects like the ones described in this article. The *Queijeiras Project* and *Cooperative Spaces-Coworks @Mountain Villages* project create new links to empower the communities of Mountain Villages in a time when more than ever, the inequalities of the most marginalized populations must be tackled so that this part of the population is not forgotten in the globalized world. Thus, such projects lead local communities from local to global without forcing them to abandon their historical legacy. Thus, they lead to the preservation of traditions, their reinterpretation, and show the importance of turning them into a history of the future. As a consequence, listening to each of its cultural territories is important when looking for ways to develop a region. Most of the time, we end up discovering that they have a very rich cultural, social, and economic heritage to offer.

In this specific case, the territories of Mountain Villages, located in Serra da Estrela and Serra da Gardunha, are cultural territories with an enormously creative and cultural potential present in their history and traditions. Adiram, with the *Mountain Villages* project, has leveraged this potential and has developed several projects to empower these communities, including the social innovation projects analyzed in this article: *Queijeiras Project* and *Cooperative Spaces-Coworks @Mountain Villages*.

In the case of the *Queijeiras Project*, the summoning of the creative industries leads to the empowerment of women cheesemakers through the appreciation of traditional practices, namely the making of cheese. Besides, the design of a burel cape and writing a book generate opportunities to pay tribute to these amazing women and their

precious work that creates such an important and traditional product in the region, the Serra da Estrela cheese.

In the case of coworking spaces, the creative industries are summoned through architecture and decoration based on the local identity and culture, which translates into the attraction of digital nomads and, consequently, a new form of tourism. The local and the global come together and establish something new, something subversive that can leave a positive mark in the territories of the Mountain Villages.

In order to empower the local communities established in the Mountain Villages, as well as others in the interior of Portugal, it is increasingly necessary to continue to support ideas and projects like the ones mentioned above. In this way, it will be possible to change the perspectives regarding the future of these communities and give them the ability to recognize their true value and raise their interest to look for new ways to develop their cultural territories. Likewise, this can help decrease the rural exodus in these interior regions and stimulate their communities' social and economic development.

Authors' Contribution

Ana Margarida Cruz Silva was responsible for conceptualization, funding acquisition, data curation, formal analysis, investigation, methodology, project administration, resources, validation, visualization, writing – original draft and writing – review and editing. Clara Maria Laranjeira Sarmento e Santos was responsible for the supervision.

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"Where's the Museum?" Reflections on the Impact of the Pandemic on Cultural Spaces and Deaf Museum Educators

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Abstract

We live in a historical context marked by social and educational changes. In this new social scenario, it is increasingly necessary to work on issues that concern the inclusion of marginalized groups. For years deaf people have organized themselves through associations and institutions with different purposes. The diversification in the way deaf groups organize themselves has gained new dimensions in recent years, and, currently, museums and other cultural spaces are places this community has claimed. The number of deaf educators in museums and visits mediated in sign language increases. With this, new strategies are designed for an effective mediation for the deaf public and, mainly, to enable the effective participation of deaf children in cultural spaces to demonstrate the importance of including artistic education in elementary and high schools for deaf children/teenagers. However, the COVID-19 pandemic has impacted these developments by closing museums and other cultural spaces during the period of social isolation. This article aims to investigate how the pandemic generated changes in the dynamics of cultural spaces, especially in the case of Brazil, and how new virtual actions mobilized deaf museum educators.

Keywords

deaf educators, museums, COVID-19, social isolation, virtual space

"Cadê o Museu?" Reflexões Sobre o Impacto da Pandemia nos Espaços Culturais e Educadores Surdos de Museus

Resumo

Vivemos em um contexto histórico marcado por mudanças sociais e educacionais. Nesse novo cenário social, é cada vez mais necessário trabalhar as questões que dizem respeito à inclusão de grupos marginalizados. Os surdos vêm se organizando há anos por meio de associações

e instituições com diferentes finalidades. A diversificação na forma em que os grupos de surdos se organizaram vem ganhando novas dimensões nos últimos anos e, atualmente, os museus e outros espaços culturais são locais que vêm sendo reivindicados por essa comunidade. Cada vez mais aumenta o número de educadores surdos em museus e visitas mediadas em língua de sinais. Com isso, novas estratégias são pensadas para uma efetiva mediação para o público surdo e, principalmente, para viabilizar a participação efetiva de crianças surdas em espaços culturais, de forma a apresentar a importância da inserção da educação artística nos ensinos fundamental e médio para crianças/adolescentes surdos. Contudo, a pandemia de COVID-19 representou um impacto nesses desenvolvimentos pelo fechamento dos museus e de outros espaços culturais no período de isolamento social. Este artigo se propõe a investigar como a pandemia gerou mudanças na dinâmica dos espaços culturais, especialmente no caso do Brasil, e como essas novas ações virtuais mobilizaram os educadores surdos de museus.

Palavras-chave

educadores surdos, museus, COVID-19, isolamento social, espaço virtual

1. Introduction

At the beginning of 2020, we did not imagine the dimension that the new coronavirus (COVID-19) pandemic would reach. The pandemic was spreading through Asian and European countries. However, there was a certain "tranquility" in Brazil, as the population was skeptical that this would become a big problem. After all, the H1N1 outbreak had already occurred in 2009/2010. Such a pandemic, at the time, did not change the overall Brazilian routine. Brazilians kept going out for work, studying, playing sports, and other leisure activities. There was no constant use of masks or alcohol gel. Despite this, it is important to reinforce the group of researchers led by Coutinho et al. (2021), who states:

> the world had already faced a pandemic and an epidemic due to infection with the coronaviruses SARS-CoV and MERS-CoV, both originating from animal reservoirs, the genus Betacoronavirus, and subgenus Sarbecovirus. The first, which occurred between 2002 and 2003, was caused by SARS-CoV, identified as the cause of SARS (severe acute respiratory syndrome) in infected individuals; the second, caused by MERS-CoV, was responsible for the Middle East respiratory syndrome (MERS) in 2011. Then, at the end of 2019, a pandemic was caused by another coronavirus also related to respiratory diseases with high pathogenicity. (p. 2)

Therefore, the flu variants are responsible for several pandemics already fought in history. In fact, all 21st-century pandemics were caused by influenza viruses. However, it is always important to remember the Spanish flu, the most devastating pandemic in history.

> The international medical community faced a great mystery when the Spanish influenza pandemic broke out in 1918. How to explain that such

> an ordinarily mild disease could cause so much disorder and death as it did throughout practically the whole world in the second half of that year? (Silveira, 2005, p. 92)

Analyzing the impacts of COVID-19, it seems that we are experiencing a Spanish flu pandemic déjà vu. The Brazilian, who used to think it was strange that Asians went out wearing masks during the bird and swine flues, soon had to adapt to a new routine. At first, it was said that only those contaminated should wear masks. However, it was soon seen that everyone should adopt protective measures, social isolation, and confinement in case of extreme need.

In the chaotic environment of 2020, several protective measures were taken. Schools and universities interrupted their face-to-face activities and adopted remote teaching. Several companies also adapted the home office, and some do not plan to have physical offices anymore. In a way, the pandemic boosted some changes that were already timidly starting in Brazil. However, among its negative impacts, in addition to the incalculable number of deaths and people with respiratory sequelae, is the closure of one of the largest economic sectors in the country: tourism.

The tourism sector moves a significant number of workers in Brazil: chains of hotels, inns and hostels, gastronomic spaces (restaurants, bars, kiosks on the beachfront, among others), and cultural attractions. Gurgel (2017) points out:

> cultural tourism has been increasingly attracting the interest of national and international visitors traveling through Brazil. The country, which already occupies eighth place in cultural resources in a ranking of 141 countries, has more than 3 thousand museums in operation in all Brazilian states. Only those managed by the Brazilian Institute of Museums (Ibram) received almost one million visitors in 2016. (para. 1)

One of the most famous postcards in Brazil, Christ the Redeemer, receives almost 2,000,000 tourists a year (Gandra, 2020). Thus, the pandemic represented an abrupt drop in the tourism sector of 36.7% (Alvarenga & Silveira, 2021). Added to the fall in other main sectors of the Brazilian economy, this represented a 6.7% drop in the country's gross domestic product (Firjan, 2021). It is the biggest drop in years.

In this way, the COVID-19 pandemic has also significantly impacted museums and other cultural spaces[1]. With the sector closing due to social isolation, several smaller cultural companies could not resist and went bankrupt. As a result, several employees were fired (Balbi, 2020). Even in large institutions, some museums laid off practically all employees in one of the sectors (the most common were cleaning and reception), thus reducing costs. In this sense, the International Council of Museums (ICOM) launched an appeal, still in April 2020, for governments to create a reserve fund for museums

[1] In this article, "other cultural spaces" are cultural centers, libraries, theaters, cinema libraries, and other spaces that promote historical, artistic, and scientific knowledge (such as planetariums and botanical gardens).

(International Council of Museums, 2020b). Shortly after that, the United Nations Educational, Scientific and Cultural Organization also released a statement emphasizing the importance of the COVID-19 period for documentary preservation (United Nations Educational, Scientific and Cultural Organization, 2020).

In addition, the main question involved was: how to keep the museum institution alive to maintain its activities during the period of social isolation? Thinking about these issues, several museums developed activities on social networks. However, a question arises: did these activities include deaf museum educators? It is this issue that we will reflect on in this article. It is worth mentioning that this research finds its ground in the virtual environment. Institutions' social network pages and their respective websites were analyzed to learn whether there was any promotion of accessible activities for the deaf.

To this end, our analysis will consider all museums and cultural spaces with deaf educators. Before, however, it is important to offer a brief contextualization about the importance of cultural accessibility and deaf educators in museums.

2. Contrasts Between the Museum Perspective and the Accessibility of the Deaf to Cultural Spaces

"In museums, deafness is judged" (Ladd, 2003/2013, p. 2). When faced with this phrase, a museologist is immediately affected by immense discomfort because the idea is that the museum is an institution accessible to different audiences. However, Ladd's (2003/2013) phrase is not judging museums. In fact, he uses it as a metaphor to understand their relationship with sign language. The museum, in this case, would be an analogy to society in general. In his museum metaphor, Ladd (2003/2013) introduces the existence of two buildings: the majestic building at the front and the annex at the back. The building in front has different listening technologies: "17th-century ear trumpets, 20th-century hearing aids, (...) in a corner marked 'The Future' there are more models of scintillating operations performed quite close to the brain" (Ladd, 2003/2013, p. 2). The curators of the front building sealed the door to the back building. As Ladd (2003/2013) manages to locate a breach to the back building, he discovers that it housed paintings "that had all been turned to the wall. (...) The paintings spoke of communities from all over the world experiencing the joy of their collective existence, a defiant pride in their sign languages" (p. 3). Ladd (2003/2013) concludes that this content should be displayed in the main building, titled "Deaf Culture", and that the contents in the other building should be moved to the annex, under the name of "Colonial Relics".

When we read this metaphor from a museological point of view, we realise that Ladd (2003/2013) indirectly uses exhibit design to organize his museum. The author separates the items from this museum into two distinct groups: one sees deafness as a disability that must be fixed ("Colonial Relics"), and the other sees the deaf person as an individual belonging to a social group that has its own linguistic and cultural elements ("Deaf Culture"). The two rooms of Ladd's (2003/2013) museum metaphor approach

collections with the same concept/theme but narrate different ideologies and political positions. However, we cannot think about Ladd's (2003/2013) exhibit design without talking about the museum as an institution. The new definition of museums, proposed by the ICOM (International Council of Museums, 2019), clarifies that:

> museums are democratic, inclusive and polyphonic spaces for critical dialogue about the past and the future. Recognizing and addressing the conflicts and challenges of the present, they hold artifacts and specimens in society's trust, safeguard diverse memories for future generations, and ensure equal rights and equal access to heritage for all people. (para. 2)

Mairesse (2012) thought of museums as inclusive institutions and highlighted that the term "inclusive museum" was incorporated into "museum literature, mainly to evoke the relationship between the museum and disabled visitors, but also more generally, the set of publics excluded from the museum" (p. 35). Thus, from the provocations instigated by Ladd (2003/2013), we can ask: do museums offer conditions for the deaf public to visit autonomously? What initiatives are taken to encourage deaf public visits? What are the necessary adaptations in the museums' exhibit design to make them really accessible to the deaf? What positions do deaf staff members hold in the museums? Is sign language mediation performed by hearing translators/interpreters or by deaf staff members?

Thinking about accessibility in museums from the point of view of someone immersed in a marginalized social group can bring to light new understandings and possibilities on this topic. However, before getting into the issue of accessibility, it is worth understanding some peculiarities of the social group that we will deal with in this article. When talking about this group, it is important to understand that "hard of hearing" is often used instead of "deaf". Regarding this fact, Veiga-Neto and Lopes (2006, as cited in Strobel, 2008a) explain that:

> in the relationship with the listeners, the deaf were taught to look at and narrate themselves as hard of hearing people. The mark of disability determined, during the history of the deaf and deafness, the condition of submission to the normal hearing person. From this history of submission, corrective practices were created, derived from the knowledge that informs and classifies subjects within the linguistic, chronological, and hearing loss development stages. (p. 80)

However, we can see in the history of the deaf that the resistance movement against hearing/audism has given rise to many social markers of this community, the main one being to identify themselves as deaf and not as hard of hearing or hearing-impaired since the term "impaired" is impregnated with a pathologizing look at deafness (Garcia, 2011).

> I'm deaf! The way I am makes a difference already! (...) Being deaf, living in the different communities of the deaf, knowing the culture, language,

> history, and representation that symbolically distinguishes us deaf people and the "deaf community" is a hallmark to support the issue at hand. (Miranda, 2001 as cited in Strobel, 2008a, p. 24)

By reflecting on deaf cultures, it is possible to contextualize and understand the main aspirations of this social group regarding access to cultural spaces. As previously noted, deaf people do not consider themselves hard of hearing but rather members of a separate linguistic community. Thus, the approach with a deaf visitor must be different from the contact with a hard of hearing visitor.

Needless to say, just as deaf people do not want to be treated as hard of hearing, the opposite is also true. Therefore, communication in signs is not appropriate for hard of hearing visitors. One such accessibility initiative is that of the Smithsonian Institution. In its museums and cultural spaces, sign language translators/interpreters are available to serve deaf visitors, and all videos have subtitles — although ideally, there should be a sign language window. Sound amplification devices assist hard of hearing visitors (Sarraf, 2013). It is also important to note that most hard of hearing visitors use hearing aids and have a greater command of the written Portuguese language. This is different for the deaf, who use sign language as L1. Garcia (2017) points out that:

> most Brazilian deaf people are illiterate [in written Portuguese], and even among those who have some level of education, it is common not to be proficient in Portuguese. Many have dropped out of school early, maintaining difficult family relationships (communication-wise). Because they do not have adequate professional qualifications for the current market's demands, it is difficult for them to get access to the formal labor market. (p. 414)

Thus, considering the accessibility of the deaf to museums, although there are texts in the Portuguese language explaining the exhibitions' details, deaf visitors are often unable to grasp what is on display. In her degree in museology, one of this article's authors witnessed a peculiar situation during a museum study visit that occurred during one of her degree subjects. The teacher asked the students to fill in a questionnaire about some general aspects, including exhibit design and accessibility. Many students noted that there was no wheelchair accessibility, as there was no elevator and many elements in the exhibit were disproportionately high for this group; others highlighted that there was no accessibility for the blind, as there was no audio description, braille, and tactile flooring. These limitations were certainly there, but an unmentioned element caused the researcher some anguish: where is the mediation in Brazilian sign language (Libras)? As she mentioned it, everyone automatically realized that they had forgotten about the deaf and corrected their answers. It is understandable. After all, wheelchair users and the blind are "identifiable", while the deaf may go unnoticed in a crowd. Furthermore, even accessibility — here in general terms in society — is neglected for "visible" differences, let alone "non-visible" ones. What voice does the deaf person have if the overall society does not even understand their language?

Bourdieu and Darbel (1966/2007) note that the "museums attendance – which increases considerably with higher levels of education – represents a feature almost exclusive to the educated classes" (p. 37). Because of the education challenges affecting the deaf, it is needless to say that access to museums has always been something distant from their reality. Thus, deaf people's accessibility to museums is a relatively recent concern, even if the "theme of democratization and access to cultural goods [is] not new; on the contrary, it is an old topic, which over time has undergone systematic processes of conceptual, political, social, legal and technological renewal" (Chagas & Storino, 2012, p. VII). Aidar (2003) adds that "social inclusion in cultural institutions must be understood as a step beyond the work of public development, seeking to expand its attributions and social implications by provoking qualitative changes in the daily lives of the groups involved" (p. 6).

Uzeda (2018) analyzes the need for "support in different fields of knowledge, skills related to architecture, visual and performing arts and design (...) in order to thrill exhibition visitors" (p. 61). Thus, the inclusion of deaf people in museums must also consider their peculiar way of interacting with the world through their specific linguistic code. It is not enough to think of a mere translation of the contents brought in the exhibitions into sign language. It is essential to think about the exhibition's language: what do you want to convey to visitors? The answer to this question should guide the translation into sign language because — as they are different languages — the words can vary in meaning.

3. The Role of Deaf Educators in Museums

Some Brazilian museums and cultural centers are gradually employing deaf educators who promote different activities to include deaf communities in the environment besides mediating in sign language. It is worth mentioning the work developed at the Museum of Modern Art of São Paulo (MAM/SP) by the deaf art-educator Leonardo Castilho. A member of the MAM/SP team since 2005, Castilho promotes a workgroup called "Corposinalizante" that "received some awards, such as 1st place in the Darcy Ribeiro Award 2009 (IPHAN/MinC)" (Museu de Arte Moderna, 2019, para. 2).

> Corposinalizante is a workgroup of the Museum of Modern Art of São Paulo that researches and produces art, open to young deaf and hearing people interested in the Brazilian Sign Language (Libras). Considering the public dimension of art and the constant interest in inventing forms of communication, the group develops cultural projects, documentaries, performances, and poetic interventions that give visibility to the deaf identity and the culture of young people. (Museu de Arte Moderna, 2019, para. 1)

One of the authors of this article has experience as a deaf educator in museums. Throughout his professional trajectory in different cultural spaces, he has noticed the increasingly frequent concern by management of Brazilian museums of rendering local museums accessible. Many of the museums still approach the issue with actions that

restrict themselves exclusively to the educational sector. It is important to emphasize that all professionals working in a museum must know how to deal with the particularities of each social group and definitely they should go beyond the educational sector and reach receptionists and security guards.

As already mentioned, a large part of the deaf community is not proficient even in the written Portuguese language, as sign languages are unwritten, and their phrasal structure differs from an oral-auditory language. Not that one is more complex than the other. They are just different. Sign languages are part of a visual-gesture modality, in which the phrasal configuration is quite different from oral-auditory languages. Moreover, this difference is sometimes reflected in the daily life of the deaf due to the daily communicational confrontation since they live immersed among users of oral-auditory languages who have little or no mastery of sign language. In the case of museums, there is no point in having content written in the Portuguese language if it is not understandable to the deaf public. In an interview with the newspaper *O Globo* in 2014, Castilho highlights:

> people, in general, are used to thinking of the world as if everyone was a listener. Nobody thinks like a deaf person. Society thinks that giving a cane to the blind, installing a ramp for the wheelchair user, and providing an interpreter for the deaf person is enough to solve everything. However, access to life, to art, goes far beyond that. We have the right to enter the museum and have a video guide to accompany the exhibition, as we have at the MAM [Museum of Modern Art] in São Paulo. To go to the theater with sign language interpreting, watch a Brazilian movie with Portuguese language subtitles. Deaf people deserve to have access to art like everyone else. (Vieira, 2014, para. 2)

Thus, regarding the work of deaf educators in museums, Oliveira (2015) explains how positive this deaf/deaf encounter is.

> The experience that the deaf group or individual lives inside the museum is closely related to the experiences of their own daily lives they will have afterwards. They are symbolic references to their own cultural universe. (...) When this group is faced with a deaf interlocutor in the mediation process, the experience becomes more concrete. The possibility of articulating and expressing themselves in their own language – Libras – provides them with a less tense and safer environment, as they know that in this dialogue, they can argue, agree, question, and express their opinion. (Oliveira, 2015, p. 33)

Besides initiatives with deaf educators in museums, some technologies are accessible to visitors with other differences. For the deaf, there is the QR code for the video in sign language next to the texts in exhibitions. Despite the deaf/deaf interaction being greatly encouraged by deaf communities, these technologies also emerge to allow

freedom to the deaf visitor who wants to visit the museum without depending on a mediator. On the use of these technologies, Uzeda (2015) explains that:

> studies in the field of museology, which were traditionally focused on the technical aspects of handling and preserving objects, when faced with the expansion of the communicational emphasis, had to direct their focus directly on the public and became shapers of the museological discourse. Understanding how the message sent to visitors is constructed from the objects on display, through textual information, and through the individual interpretation of each one is now a fundamental concern in museums. (p. 11)

The researchers Chagas and Santos (2007) define these issues in a short sentence: "to think about museums is to embed them in our world" (p. 12). Articulating this statement with the deaf people's challenges, we realize that this group's social movement has made some progress towards their aspirations, though taking in small steps, such as in the formalization of Libras (Decreto nº 5.626, 2005; Lei nº 10.436, 2002) and the regulation of the Libras-Portuguese translator/interpreter profession (Lei nº 12.319, 2010). These and other advances could be considered grand if not for the continued non-compliances with the law, inclusive in public institutions. Thus, Garcia (2017) states that:

> Brazil is slowly moving towards political recognition of the linguistic and cultural differences of the deaf since it still does not effectively encourage the bilingual education of this group. That said, despite it being considered an unquestionable advance in the political recognition of the linguistic rights of the deaf, one should not nurture the misleading and naive belief that the official recognition of LIBRAS in the national territory alone entails tangible changes in social and educational practices aimed at this population. (p. 421)

As the access of deaf people to museums is still recent, these elements must be considered as a guide to the conceptions of deaf people about what their experience of visiting museums looks like. By understanding their views on the field, it is possible to include them in cultural accessibility projects in museums. Deaf people must be able to access cultural spaces to consume the pre-existing mainstream culture, that of the listeners, and be transforming agents of culture. Meira and Silva (2013) suggest that "artistic and creative processes operate hybridisms that trigger transformations in practices and reflection across theory, practice and life context" (p. 48). Thus, before these hybridisms — we could even use Burke's (2000/2003) term "cultural hybridism" here —, it is necessary to consider that the deaf people have a visual culture, a deaf culture.

> Deaf culture and sign languages form one socio-semiotically recognized language with its own particularities. Referring to the theme of deaf culture and accessibility in tourism is, above all, bridging a gap of social crippling created by careless public policies, by the denial of differences, which

> requires work, research, and involvement with movements and with deaf culture. (Soares et al., 2013, p. 3)

The first step in creating a truly accessible environment for this social group is to encourage dialogue with deaf people and demonstrate that they can actively participate in this space. With this in mind, teaching arts to deaf children/adolescents, and promoting visits to museums, is important to provide these students with tools to express and demarcate their cultural and linguistic identity. According to Strobel (2008b):

> deaf culture also involves the deaf art artifact and paintings, sculptures, theater, poetry, among other. Many deaf artists in different contexts, including actors, sign language poets, painters, magicians, sculptors, storytellers, among other. (...) Many deaf people have talents for the art of body expression, and it should be encouraged by the school, family, and deaf people. (p. 64)

Deaf actress Sandrine Hermanse (as cited in Aniceto, 2019) reports in an excerpt from the film *Sou Surda e Não Sabia* (I Am Deaf and I Didn't Know) her experience watching, for the first time, a deaf and hearing people mixed theater: "everyone used [French] sign language[2]. Why wasn't it like that in society? That's what encouraged me to perform theater with sign language. That allowed me to build my identity. I felt proud to show my language" (p. 87).

Bearing all this in mind, it is important to emphasize that the visits to museums mediated in Libras should ideally be provided by deaf educators and that deaf teachers should also provide art teaching in schools. In fact, they should teach art and all other subjects in the curriculum. Firstly, because it avoids "noise": having a hearing teacher teaching with an interpreter will prevent the deaf students from understanding much information, either because of the teacher's methodology or due to the poor training of interpreters. Secondly, and no less important, to allow deaf students to exchange experiences with their peers. Like all children, the deaf also need to have models to inspire them in their development as an individual.

Regarding schools, the oldest educational institution for the deaf in Brazil is the National Institute of Education for the Deaf (INES). INES was founded on September 26, 1857, by the French deaf professor Ernest Huet at the invitation of King Pedro II because there were deaf members in the royal family. This institution went through the prohibition of sign languages with the imposition of oralism, among other milestones in the history of deaf education. As for art, INES has a history of appreciation of its students' encouragement of visual arts. In the 1930s, the deaf sculptor, Antônio Edgard de Souza Pitanga, graduated from the National School of Fine Arts and taught the subject of

[2] "Like any other language system, sign languages differ across the world, including many dialectal variations. Even in countries with the same official oral-auditory language – the case of Brazil – sign languages are different, showing that sign production is separate from the oral system" (Garcia, 2011, p. 14).

Drawing and Crafts. In the 1960s, several renowned artists also taught at the institution, such as Lygia Clark (Zanellato, 2016). Hence, students had classes in different types of handcrafts: painting, sculpture, sewing, and carpentry, among others. These classes no longer exist, as the INES has the same curricular structure as regular schools. However, that legacy is still alive in the memory of the institution. As we walk through its corridors, we can see several sculptures and paintings made by its students.

4. The Impact of the COVID-19 Pandemic on Relations With Cultural Spaces

As highlighted earlier, drastic and urgent measures were taken for the population's safety due to the highly transmissible virus pandemic. Some of the numerous institutions affected by this scenario were museums. From the smallest to the most famous, no museum was immune to the impacts of this crisis. The Metropolitan Museum of Art in New York (The Met) alone estimated a loss of more than $100,000,000 (Pogrebin, 2020).

However, the closure of important cultural bridges was greater than the financial losses. With this in mind, most museums were restructured to embrace the online format (Beiguelman, 2020). Although this does not mean a significant transfer of funds to museums — given that: (a) most of these activities promoted by museums in the last 2 years were completely free of charge, and (b) the amount received for monetization varies greatly depending on the profile on social networks — it is a way to give the entire population a sign of hope amid the turbulent times we are going through. The assistant director-general for culture of the United Nations Educational, Scientific and Cultural Organization states that:

> museums are more than just places where humanity's heritage is preserved and promoted (...). They are also key spaces of education, inspiration, and dialogue. At a time when billions of people around the world are separated from one another, museums can bring us together. (Ottone, 2020, as cited in Roque, 2020, para. 4)

ICOM organized a small handbook on how to interact remotely with the public, listing the following measures (International Council of Museums, 2020a): making collections accessible on the internet[3], organizing mediated visits through lives[4], and promoting public engagement on social networks with polls and hashtags. One of Brazil's most successful hashtag initiatives was the "#pinadecasa" implemented by the Pinacoteca do Estado de São Paulo. The number of likes on their social networks increased by 5,000 followers in just 1 month (Racy, 2020). Another initiative was the promotion of free

[3] The museum web tour initiative started some years ago, but it was restricted to institutions with greater purchasing power. Currently, most institutions have made efforts to make their collections digitally accessible, even if just through photos without requiring more sophisticated resources.

[4] Unlike the web tour, an internet application that provides a 360º view of each room in the museum, in the mediated visit, we usually have staff member of the educational sector promoting a debate with the public through live streaming. That allows for more personal interaction.

workshops and/or certified workshops for a symbolic price on museum-related subjects. One of the researchers in this article followed some such initiatives of the Museum of Sacred Art of São Paulo and Acesso Cultura (Portugal). The Prado Museum is one of the best examples. During the pandemic, its social media engagement increased by more than 120% (García, 2020). Through the Google Arts & Culture application, it is now possible to access online visits to 2,500 museums (Glette, 2020). Internet visits to the Louvre Museum increased from 40,000 to 400,000 in just a few months (*Covid-19: Fechados, Museus Europeus Buscam Novos Públicos na Internet*, 2020).

> The public, confined at home, adheres to these initiatives as a strategy to escape the anxiety caused by isolation and the anguish provoked by the news of illness and death. They visit museums they have never been to before or visit them differently, reinventing routes, observing the works, and seeking readings that give them meaning. (...) It is an optimistic and idyllic vision in a crisis. Reality has a dark and negative side, still poorly understood as to its scope and unpredictable as to its impact. After a fracturing reality like the one we are experiencing, nothing can go back to being as it was before, and, alongside some positive signs, there are worrying signs. A study conducted by NEMO – The Network of European Museum Organisations, until April 3, with a sample of 650 museums from 41 countries, shows that the impacts of the crisis are hitting European museums hard. Closures led to a huge loss of revenue from tickets, shops, restaurants, and other services. The main museums, located in tourist areas, reported losses between 75 and 80%, totaling hundreds of thousands of euros. (Roque, 2020, paras. 6, 9)

Roque (2020), far from being pessimistic, is just leading us to the following reflection: how to balance the virtual and face-to-face worlds where museums currently live? After all, however optimistic we may be, nothing will be like before the pandemic. As mentioned earlier, some companies have completely abandoned the physical office and will permanently adapt to the home office. From now on, this will reflect on our society: there will be more and more virtual interaction and less face-to-face. There is a real and extremely high possibility that museums will never again have the same flow of visitors as they did before the pandemic.

> At the Florence Cathedral Complex in Italy, which reopened on May 22, visitors receive an electronic necklace, the first of its kind in the world that beeps, vibrates, and blinks, warning when you come too close to another person. In the cradle of Renaissance humanism, this is perhaps a particularly dystopian image of everyday life under the impact of Covid-19. (...) If beeping necklaces and colored sticks illustrate changes that Covid-19 brought to museums, the feature of this new normal that should most impact the visitation experience – and the operation of institutions – is the

> reduction in attendance, at least in museums used to large influxes of visitors. (Fontoura, 2020, paras. 10, 17)

A great example that makes this collective milestone clear is the creation of the Covid Art Museum (https://www.covidartmuseum.com/), which has two main foci: disseminating art made during the pandemic and reflecting on how current events impact the way art is made. That is not the only initiative in this regard. The National Museum of Finland was a forerunner when it interviewed Helsinki residents to find out how they felt amid the chaos of the previous year (Gobbi, 2020).

The Ibermuseus (2020), a cooperation program between Iberian-American museums, surveyed 434 institutions from 18 countries. In this survey, 60% of private or mixed-fund institutions reported having laid-off staff, especially in closed sectors, such as guided tour mediators and outsourced service personnel (search results are available at Ibermuseus, 2020).

A concern during this new adaptation process of museums to a platform that professionals had little command over is the fact that the few initiatives of deaf accessibility have practically disappeared. That is because most deaf educators work in sign language-mediated visits, which were among the sectors that were considered halted. Furthermore, there were reports of deaf educators fired or who had their salaries frozen during the aggravation of the pandemic.

Despite this, Brazil was one of the countries that mobilized the most in this regard. In April 2020, as soon as the pandemic started in the country, MAM/SP launched the "#MAMonline" campaign with different activities, including weekly lives in Libras on subjects such as deaf culture and cultural mediation (*Com Foco em Acessibilidade, MAM São Paulo Promove Lives em Libras*, 2020). In April 2021, the Museum of Tomorrow launched the innovative proposal of the Museum in Libras. Every 2 months, a new temporary exhibition is displayed in a virtual room on a video conferencing platform with a limited number of invitations. According to the São Paulo State Museum System (Sistema Estadual de Museus de São Paulo, 2021):

> thus, recognizing the current complexity experienced by the aggravation of the pandemic across the country and the numerous language barriers experienced by the deaf community in accessing information and knowledge to cope with it, the theme of the first edition of the Museum in Libras had to be the coronavirus. In direct dialogue with the new temporary exhibition, Coronaceno – Reflections in times of a pandemic it seeks to provoke reflections on the concepts and relationships highlighted by the advent of Covid-19. (...) All mediation will be conducted in Libras and rely on interpreters' performance. The activity is committed to the United Nations 2030 Agenda[5]. (...) In partnership with the Museum of Inclusion, the event relied

[5] This agenda has also been encouraged by the Centro Cultural Light (2022).

> on museum educators Bruno Baptista (Museum of Tomorrow) and Harry Adams (Memorial of Inclusion). (paras. 3–6)

Espaço do Conhecimento (Knowledge Space) of the Federal University of Minas Gerais also recently promoted a live activity (September 2021). However, the topic was somewhat peculiar: communication with the deaf in museums. It made people wonder: why emphasize communication with the deaf? Does the museum have a deaf educator? Wouldn't deaf-to-deaf communication be preferable? Furthermore, the news page emphasizes the term "language of signs" when the correct word is "sign language" (Universidade Federal de Minas Gerais, n.d.). It is also worth mentioning that this is an isolated initiative on the occasion of "Blue September"[6].

Another somewhat questionable initiative was that of the Dragão do Mar Center of Art and Culture. Despite the many highly interesting lives promoted on its channel, it had only one with translation/interpretation from Libras-Portuguese, because the speaker was deaf (Dragão do Mar, 2020). In other words, can the deaf only access what "concerns the deaf"? Can they not access any other content of interest to them? The same occurred at the Museum of Life (Museu da Vida / Fiocruz, 2020). With this in mind, one could also highlight the Oi Futuro initiative with a Libras-Portuguese translator/interpreter in all the videos of *Papo de Futuro* (Talk About the Future; Oi Futuro, 2021), giving the deaf the access to subjects beyond those of cultural accessibility. In this regard, Savedra (2021, as cited in Rodrigues, 2021) warns that accessibility through subtitles and sign language windows "will only be effective if the deaf is part of the production and post-production process, just as there is no way to plan access ramps without wheelchair users testing them" (para. 4). The old — but rarely respected saying — "nothing about us without us". A museum that has sought to subvert this logic by introducing the "all about us with us" is the Museum of Inclusion, founded in 2009, which will soon have virtual exhibitions, but for now, has promoted several fully accessible lives in Libras designed with the entire education team, which also includes deaf educator Harry Adams (previously mentioned; https://portal.museudainclusao.org.br/).

5. Final Reflections

We think that the museum institution did try to reinvent itself and adapt to this new moment we are experiencing, but even so, the institutions' efforts do not seem to have had a specific focus for a given social group. It was not clear whether the educators of these museums were involved in the activities reflecting on how to extend accessibility to different social groups. Thus, through very initial research, it was possible to verify that

[6] "As a result of the international movement, the deaf have created a symbol-mark of this struggle. Strangely, it's the same used by the world movement to fight HIV/AIDS, only in blue. (...) Also, arising from the partnership and formal link between different institutions for the deaf with the WFD [World Federation of the Deaf], the mobilization around the National Day of the Deaf grows every year. (...) WFD celebrates the date on the September 30. However, Brazil chose September 26 to promote a connection with the institution that holds much of the history of the deaf in the country: INES" (Garcia, 2011, pp. 115–116).

museums grope about the virtual space, but also the initiatives that concern the deaf public were incipient to supply a series of very relevant contents that museums have promoted.

Nevertheless, we hope this pandemic moment is one of deep reflection by museum professionals to have more initiatives and not just think about using deaf museum educators in mediated visits. It is undoubtedly fundamental, but several other initiatives can be developed: soirees, workshops, among other. May we use these times of uncertainty (International Council of Museums Brasil, 2020) to reinvent our practices. After all, museums have already overcome other crises and stood firm as institutions ready to safeguard memories and narrate such events to future generations (International Council of Museums, 2020c).

We also hope that our brief reflections can help all the social actors involved in museums and cultural spaces, whether they are museologists, educators, among other professionals, to gather strategies so that these places can effectively comply with the new definition of ICOM as spaces where there is full democracy and access to information.

Authors' Contribution

Maria Izabel dos Santos Garcia developed the methodology and she was responsible for collaborating on the conceptualization and investigation of the proposed article. She was responsible for the project administration, supervision and she participated in writing – original draft. Rebeca Garcia Cabral was responsible for the data curation and collaborated in the conceptualization and investigation of the proposed article. She participated in the overall writing process (writing – original draft; writing – review and editing). Bruno Ramos da Silva collaborated in the conceptualization and investigation of the proposed article. He participated in writing the original draft.

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Risk Tourism Within Viral Society: A Study Using Hybrid Discourse Analysis

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Abstract

In recent decades, sociologist Ulrich Beck (1992) has been warning about the risk society in which we operate today, which includes risks that are not only conjunctural but essentially structural, such as pollution and global warming. Recently, contemporaneity faces a new serious risk, the pandemic caused by COVID-19, which seems to be transforming our social formations into a viral society. In order to understand these social processes and sociological questions, the present text draws attention to one of the most relevant social and intercultural mediations in the current social framework, the articulation between the coronavirus pandemic and tourist activities. A case study deals here with the discourse produced about such themes by digital social network Wikipedia. This study is contextualized by theoretical and practical reflections from tourism studies and supported by ideas such as "viral risk" and "viral risk tourism". A sample of content extracted from Wikipedia is analyzed and interpreted through a qualitative and quantitative method developed by the author, named "hybrid discourse analysis", which uses, among other interpretive tools, the "alphabet of interconceptual relations".

Keywords

risk society, viral society, viral risk tourism, hybrid discourse analysis, alphabet of interconceptual relations

Turismo de Risco na Sociedade Viral: Um Estudo Usando a Análise Híbrida do Discurso

Resumo

Nas últimas décadas, o sociólogo Ulrich Beck (1992) tem alertado sobre a sociedade de risco em que vivemos hoje, que inclui riscos não apenas conjunturais, mas essencialmente estruturais, como a poluição e o aquecimento global. Recentemente, a contemporaneidade enfrenta um novo e grave risco, a pandemia causada pela COVID-19, que parece estar a transformar as nossas formações sociais numa sociedade viral. Para compreender estes processos sociais e questões sociológicas, o presente texto chama a atenção para uma das mediações sociais e interculturais mais relevantes no atual quadro social, a articulação entre a pandemia do coronavírus e as atividades turísticas. Um estudo de caso trata aqui do discurso produzido sobre tais temas pela rede social digital Wikipedia. Este estudo é contextualizado por reflexões teóricas e práticas dos estudos de turismo e apoiado em ideias como "risco viral" e "turismo de risco viral". Uma amostra de conteúdo extraída da Wikipedia é analisada e interpretada por meio de um método qualitativo e quantitativo desenvolvido pelo autor, denominado "análise híbrida do discurso", que utiliza, entre outras ferramentas interpretativas, o "alfabeto de relações interconceptuais".

Palavras-chave
sociedade de risco, sociedade viral, turismo de risco viral, análise híbrida do discurso, alfabeto das relações interconceptuais

1. Introduction: Is a Viral Society Emerging?

"Viral society" is a concept coined in previous studies undertaken by the author of the present text since the rise of the COVID-19 pandemic (Andrade, 2020, 2021; https://www.sites.google.com/view/viral-tourism-city). For example, the current pandemic crisis seems to indicate that coronavirus is deconstructing the current "network society" and reconstructing it in an emerging paradigm of society. Viral society is characterized, among other traits, by viral economies and technologies, viral politics and politicians, viral cultures and cults.

Studies about the COVID-19 pandemic confirm the relevance of various social dimensions of this process: on the economic realm (Gans, 2020); in what regards the "heroes of the pandemic" (Naik, 2020); or the dramatic situation in Italy in the first months of the outbreak (Rio, 2020).

The present text aims to reflect on such pandemic situations, articulated with a specific social process, tourism, especially regarding the risks that this activity may trigger. The aim is to construct a kind of mediating concept, "viral risk tourism", which testifies to such reality. Both these phenomena, the pandemic and tourism, require appropriate intercultural mediations. Moreover, under the coronavirus pandemic, these mediations are gradually occurring in cyberspace.

Therefore, it is urgent to study the plethora of virulent processes that migrated towards sites pages, social networks, among others. A case study is presented that analyses the discourse produced about such intermediate and hybrid themes by digital social network Wikipedia, in close connection with concepts and ideas originated inside tourism studies. Hybrid discourse analysis (HDA) is a qualitative and quantitative method developed by the author, which is used for this analysis by applying one of its particular interpretive tools, the named "alphabet of interconceptual relations" (from now on referred to as "alphabet"), an interpretative tool supported by qualitative and statistical softwares, such as NVivo.

The structure of the present text reflects the preceding debate. Firstly, a brief sociological discussion about viral risk tourism is held. Secondly, the methodology concerning HDA is explained. Thirdly, a case study is presented on the Wikipedia discourse on the COVID-19 pandemic and tourism. HDA is reintroduced for this aim. Subsequently, this methodology is detailed via the analysis and interpretation of concepts and relations among terms, that may elucidate the underlying social phenomena. The method is better exemplified through a specific type of sociological network, the semantic-logical networks. Clarification and usefulness of HDA is demonstrated, more extensively and intensively, by specific and deeper relational analysis and interpretation. Finally, the

conclusion exposes some considerations and recommendations. At the end of the article (see Appendix), a glossary summarises some core debated concepts and their main relations. However, the reader should take note that this is an incomplete scientific instrument, as the ideas in the text relate, necessarily, to an infinite, but not always undefined, intertextuality within the rhizome of all local and global social and sociological texts circulating worldwide.

2. The Sociological Debate on Viral Risk Tourism

In order to develop the debate on viral risk tourism, the present text applies the alphabet mentioned above in two ways: firstly, it defines some major theoretical relationships among sociological concepts forged by seminal authors, indicated below, who discussed social issues relevant for the analysis. The author does not intend to develop an extensive or intensive theoretical articulation among such authors. Rather, the aim is to give some quick examples of how this relational alphabet can be applied to such concepts within a coherent concept map, which constitutes a powerful method for connecting sociological ideas to raise pertinent questions and formulate verifiable and valid hypotheses (Figure 1).

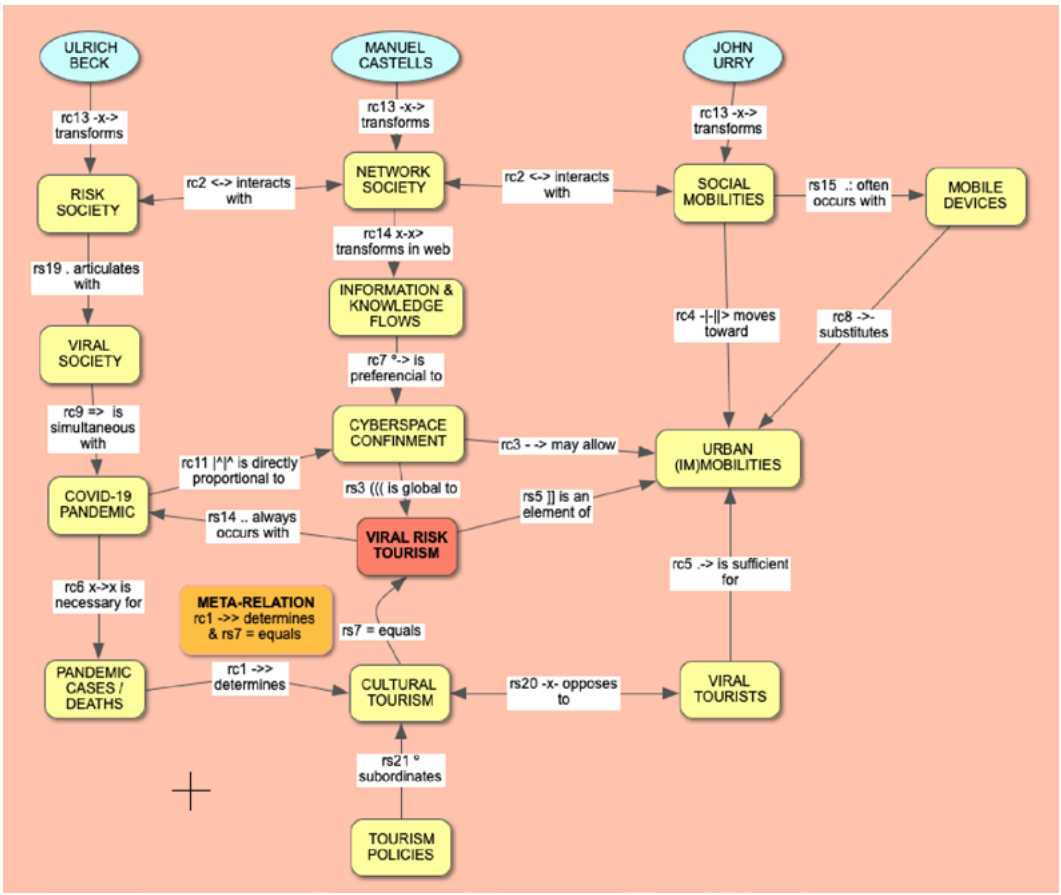

Figure 1 *The debate on viral risk tourism*

For the development of such authors' original ideas, see Ulrich Beck (1992, 2013, 2016), who reflected on the so-called "risk society". This is a societal paradigm where risks are not just conjunctural but mainly structural, as they derive from the very essence of capitalism, a system that causes irreversible unbalances for the planet, such as climate change. Moreover, Manuel Castells (1996) circumscribes the "network society", a social fabric dominated by networked information flows. And John Urry (1990, 2007), developed the ideas of "tourist gaze" and "urban mobilities". The concept "mobilities" refers to everything that moves, locally and globally, and is transformed: capital, labor force, goods, information, and so forth.

These terms may be connected with the conceptualization discussed in the present reflection, for example, the notion of "viral risk tourism", via relationships extracted from the alphabet. This alphabet defines 37 central sociological and logical relations: 23 relationships having a structural nature (here associated with social structures); and 14 connections of a conjunctural nature, testifying to social events and actions (Andrade, 2007a). Figure 1 gives some examples of these connections, where the codes corresponding to each of these relations are indicated. To demonstrate this interpretive strategy, on the left part of Figure 1, the concept "risk society" articulates with the notion "viral society", as pandemics in general and the COVID-19 pandemic in particular constitute some of the major risks within the contemporary world. Likewise, "risk society" interacts with "network society" because the coronavirus caused the displacement of many social activities towards cyberspace and to digital social networks.

In what regards the notation used for the definition of relationships, for example, "r6 x->" is a code that signifies *necessary condition*, "r6" means the sixth relation of the alphabet, circumscribed within the "conjunctural sociological class", and it is named "conjunctural relation 6". Such link is expressed in Figure 1 as "r6 x-> necessary condition", as it connects: (a) on one side, the "anterior concept" (causes, etc.) expressed via a sentence within natural language, for example, English (and inside the corresponding sociological proposition), in this case, "COVID-19 Pandemic"; and (b) on the other side, the "posterior concept" in a given sentence/proposition (effects, etc.), here named "pandemic cases/deaths", a social process illustrated, among others, through this text's next part.

Secondly, this text draws on empirical analysis and interpretation of Wikipedia pages about "COVID-19 pandemic" and "tourism", contextualized by the precedent theoretical reflections and through a case study, which applies the alphabet more systematically, by using both qualitative software, such as NVivo, and quantitative or statistical software.

3. Methodology: A Genealogy of Hybrid Discourse Analysis

A methodological strategy developed over several years of research, named HDA (Andrade, 2016), will be revisited here. This methodology includes and applies: (a) substantively, sociological concepts based on postcolonial studies, among other sociological schools, such as the notion of "hybrid"; and (b) epistemologically, traditional sociological

methods, for instance, discourse and content analysis, hybridized with new media methods and techniques, for example, qualitative and quantitative discourse analyses vehiculated through softwares such as NVivo, and digital games or augmented reality. Here, only qualitative and quantitative discourse analyses will be exemplified.

For such purpose, HDA may use semantic-logical networks, which are conceptual networks organized by concepts and by logical relations-concepts, which are explained and exemplified below.

This method has been developed by the author for some decades (Andrade, 1985) on sociological networks, relations-concepts, among others: for example, an essay about the variable and changing nature of concepts, which take on different meanings depending on the social context of their enunciation. The relationships among concepts themselves can acquire great relevance within social interaction or inside social sciences writings. Through such social or sociological moves, these relations can be transformed into concepts of a new type, that is, relations-concepts (Andrade, 1991, 2002).

Moreover, HDA forged its foundations in the universal character of the hybrid. This concept has been the subject of several debates in recent decades, mainly within postcolonial studies (Appadurai, 2013; Bhabha, 2004; Canclini, 1995/2005; Said, 2008). In the present research, the hybrid was applied to the following objects of study, among others:

- In what regards digital arts, in 2006, the notion of the hybrid was connected with net art and the construction of a new type of blog, the *hybrilog*. This is a hybrid blog, including and hybridizing several types of blogs, each based on a different medium (e.g., a text blog, a video blog, a video poetry blog, a digital art blog, etc.). The social sphere where blogs operate has been referred to as the blogosphere. Similarly, the social scape where hybrilogs circulate can be denominated the "hybridosphere". Within the hybridosphere, for example, a blogart is a type of internet art that has the form and features of a blog, and the hybrilog may act as a blogart or as another kind of cultural and artistic hybridization (Andrade, 2006a). The hybrid may also be used as a resource for the practice of hybrid writing across multiple new genres of blogs, such as the hybrilog, or inside any other writing media (Andrade, 2006b).
- The hybridization of literacies is another core concept used to understand and apply HDA (Andrade, 2011a, pp. 71–72, 2014). Literacy may be defined as a set of social reading and writing processes, including competencies and performances underlying a given mode of knowledge, in addition to the reading and writing regimes of a national or mother tongue. Articulating these literacies, an unprecedented way of knowing is emerging, *hybridology*, which focuses on the hybrid entities and identities that proliferate inside contemporaneity, especially within digital social networks. Examples are provided within a case study of audiences undertaken at the Berardo Collection Museum in 2010, through hybrid methodologies such as the multitouch questionnaire and the trichotomies game (Andrade, 2011b). Another illustration of hybrid sociological methods is the *geoneologic novel* (Andrade, 2007b, 2011b, p. 52). Or, in the cultural heritage area, a reflection on a sociology of ruins shows an example of hybrid methods through a case study undertaken in the context of digital social networks (Andrade, 2013). Another synthetic debate on hybridology, connected with the digital sphere and new media, can be found in Andrade (2015).

4. Analysis and Interpretation of the Wikipedia Corpus: Questions Within Hybrid Discourse Analysis

This case study is about the Wikipedia pages that debate "COVID-19 pandemic" and "tourism", contextualized essentially by tourism studies.

The specific questions that HDA asks in order to interpret the corpus of the Wikipedia cyberspace pages are the following:

1. Which *social processes* emerge as the most relevant for the authors of those pages (and for their inherent social discourse), among the topics associated with COVID-19 and tourism?
2. Which are the *core concepts* that represent these social phenomena?
3. What *social relations* articulate such concepts?
4. It is possible to identify *meta-relations,* that is, relationships that associate other relationships?

These concepts and their relationships make visible pertinent sociological networks, which are defined as conceptual constellations that present a synthesis of the spoken/written social reality, in this case immersed within the selected Wikipedia pages. As observed below, such sociological networks may be specified into semantic-logic networks. These more particular networks translate, on one hand, the semantic meanings that social actors produce via sentences and words belonging to natural languages (English, Portuguese, etc.) into, on the other hand, (socio)logical propositions. For example, within a semantic-logic network, common words such as substantives are transformed into concepts; verbs are used as inter-conceptual relations; and daily sentences are modified into logical propositions.

5. Social and Sociological Dimensions of "Viral Risk Tourism" Concept

As described in the "Introduction" section, HDA may be detailed through various stages. The first step is conceptual. It considers not just the main concepts that organise the text but also their social and sociological dimensions. In the retained corpus "social structures" are the most frequent social dimension, with 3,845 mentions to the respective concepts, within the sentences of the text previously divided into (socio)logical propositions (see Figure 2).

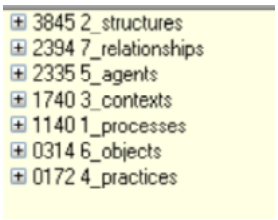

Figure 2 *Social and sociological dimensions*

Note that "relations among concepts" are the second more cited analytic class (2,394 occurrences inside the texts analyzed).

The process of "tourism" is in part understood sociologically as a social-economic, and cultural/discursive structure, inside the dimension "social structures". Our corpus has 2,545 sentences referring to "discursive structures", such as "arts and cultures" (378 propositions), a social structure more and more practised by contemporary cultural tourists (cf. Figure 3).

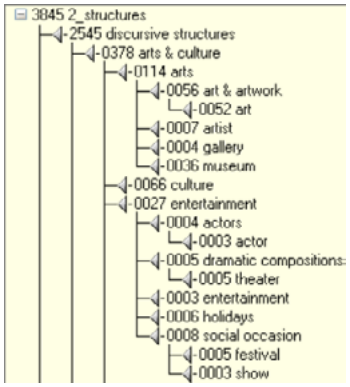

Figure 3 *Discursive structures*

Another dimension widely represented in the corpus is the "social agent", particularly their relationship with the social structures "medicine and health" (Figure 4 and Figure 5).

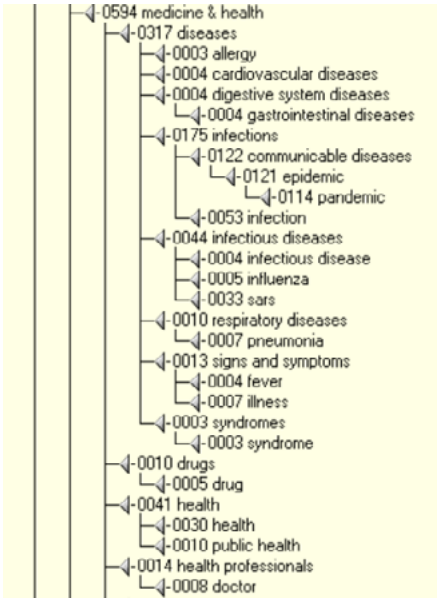

Figure 4 *Social agents' health*

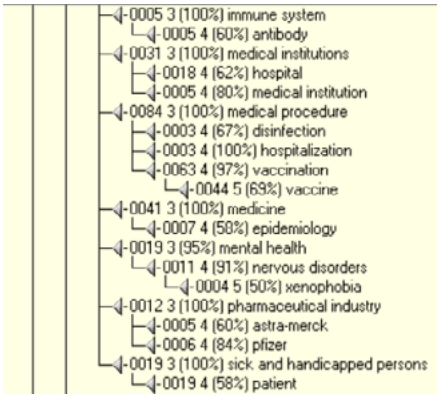

Figure 5 *Social agents' health (continuation)*

Note the 114 mentions to "pandemic" under the sub-category "infections". And 33 references to "sars", within the sub-class "infectious diseases". In addition, "vaccination" registers 63 occurrences, and both the vaccines Pfizer and Astra-Merck receive four indications within the "pharmaceutic industry".

Some other related concepts are visible inside the social sentences and sociological propositions within the corpus, for example, the social agents "doctor" (eight) and "patient" (19).

And what about the "tourism industry", another pertinent social-economic structure in this case study? It belongs to a broader structural category, "transport and travel". The sub-class more related to tourism is "trip and travel", showing a frequency of 698 times within the corpus (Figure 6).

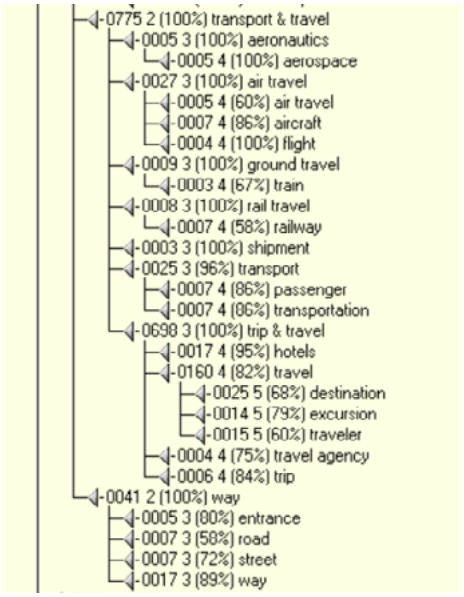

Figure 6 *Tourism industry*

6. Semantic-Logical Networks

A second stage that details HDA is the following: concepts can be more deeply understood via their relationships inside semantic-logical networks, that translate social meanings into sociological signifiers.

Observing a semantic-logical network within Figure 7, it becomes clear that the central concept "tourism" is surrounded by other concepts through concentric circles that express a greater or lesser degree of association with the central concept.

Figure 7 *"Orbital" semantic-logical network including concept "tourism" and its satellite concepts*

Horizontally, this network conotates the conditional position of concepts within the full set of written sentences or all corresponding (socio)logical propositions. On the left, the antecedent concepts (causes, etc.) are found, such as "religious" for religious tourism, or "art" showing its influence, for example, in cultural tourism, and so forth. On the right, the subsequent concepts (effects, etc.) are visible, for example, "security" in tourism, or "communication" activated in tourism activities, and so forth.

A more complex sociological network is presented in Figure 8.

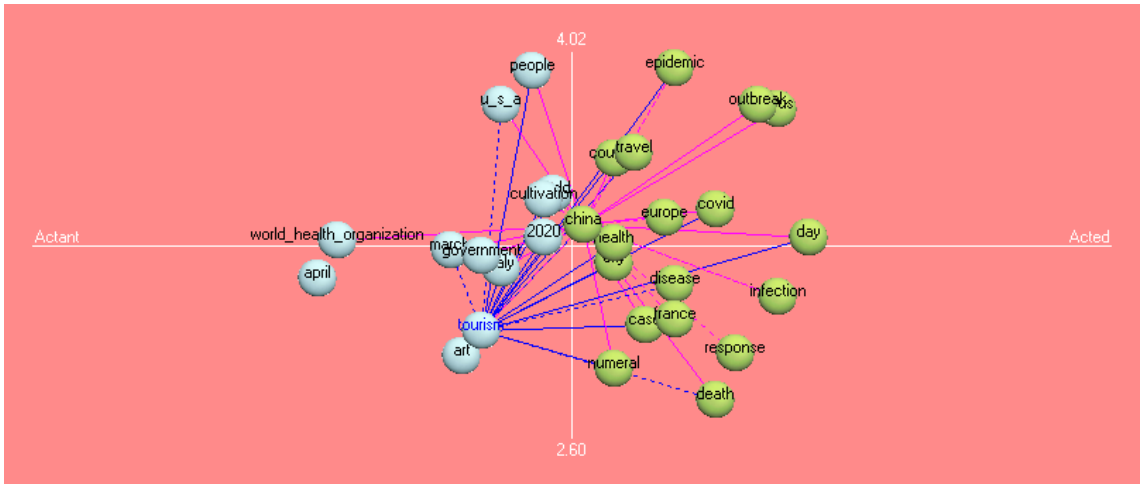

Figure 8 *"Axial" semantic-logical network showing "tourism" and its actant and acted social processes/sociological concepts*

Tourism is situated here as *actant*. This means a conditionality in relation to other social phenomena translated by concepts, the *acted* ones. For instance, in this corpus, "tourism" is treated as an influencing factor to other social processes, such as the pandemic outbreak of COVID-19. However, other processes/concepts also present this conditionality, for example, "people", the "USA", the global world space, the year "2020" and the month "March", or some "governments", or countries such as "Italy" where the

pandemic began in the west. Curiously, "China" is placed in an ambiguous position, both as the cause of the pandemic and one of the countries that fought it more systematically.

As in the network in Figure 7, in Figure 8 concepts are represented by spheres. The lines show (socio)logical relationships among these concepts. Such a network also hybridizes qualitative and quantitative approaches.

- *Qualitative perspective*. Observing more closely the actant/acted ratio, visible at the horizontal X-axis, the notions to the left, noted in blue, mean anterior/antecedent/precedent/previous words in the totality of the social language's sentences and within all of the (socio)logical propositions. The concepts to the right, in green, represent the posterior consequent/following/resulting notions, within all the social sentences and sociological propositions of the corpus.
- *Quantitative perspective*. The relations for each concept are concentrated around the vertical Y-axis. The strongest relations are located at the top of the network, and the weakest at the bottom. A solid line indicates a frequent association, and a dotted line connotes an infrequent link.
- Another configuration of a semantic-logical network can be seen in Figure 9, hybridizing *qualitative interpretations and quantitative measurements*.

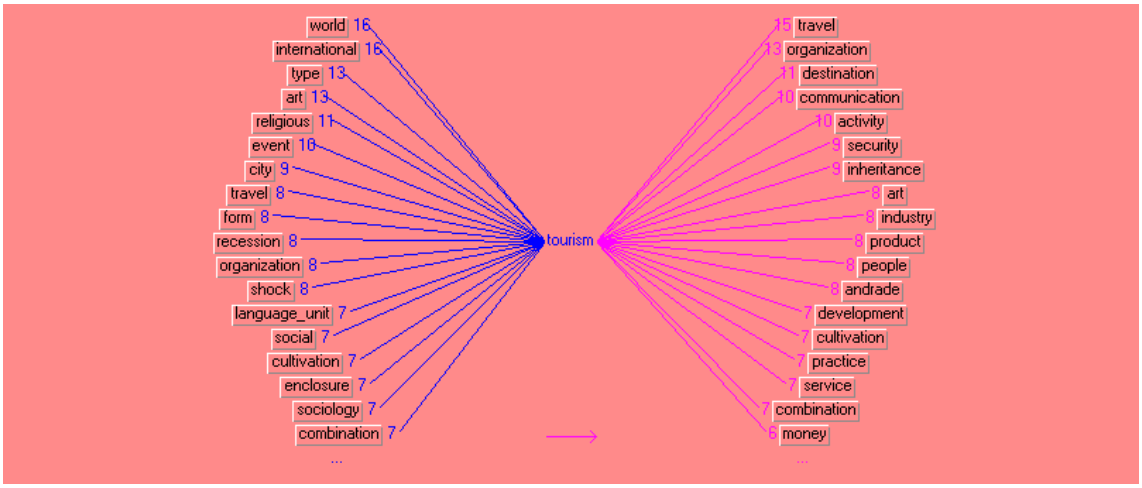

Figure 9 *"Star" semantic-logical network on tourism with concepts frequencies*

As for the qualitative approach, the relationships are now more ordered and distributed between two lists of concepts with the form of a star, the previous ones and the following ones, around the central concept.

Concerning the quantitative positioning, the social and semantic (qualitative) articulations are ordered (quantitatively) from the higher frequencies on top to the lower occurrences at the bottom. For example, "international" and "world" occur 16 times, which denotes the global relevance of tourism. By comparison, "city", a more local social territory and a more specific sociological concept, appears only nine times.

Using HDA, it is also possible to conduct the interpretation deeper, by changing the social and conceptual "point of view". For example, transiting from the central concept "tourism" (in Figure 9) into the core concept "covid" (Figure 10).

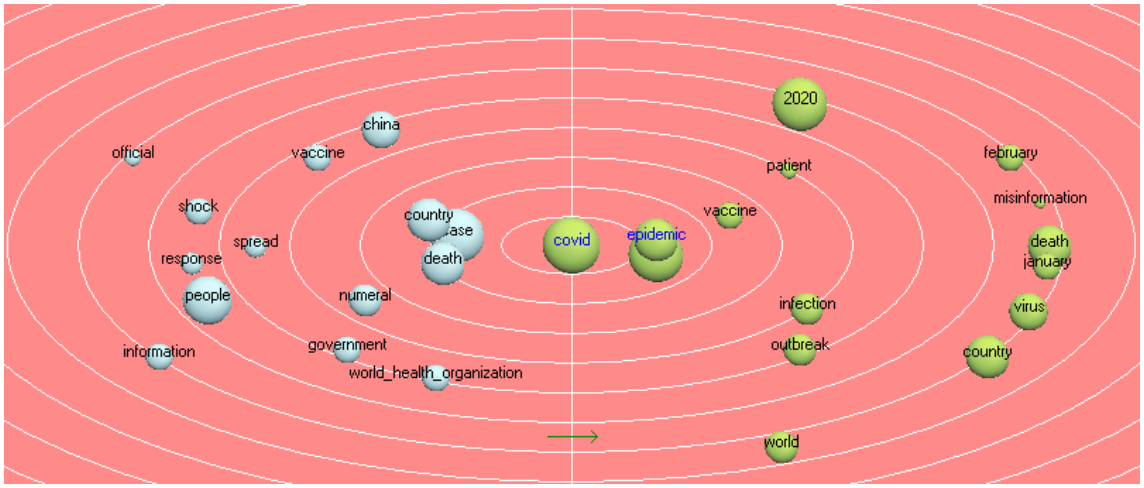

Figure 10 *"Orbital" semantic-logical network including core concept "covid" and its satellite concepts*

This movement is called "transitivity". When the researcher inquires the corpus via the social process and the sociological concept "covid" as the core magnifying glass, other related concepts emerge, such as the vaccine as an influent weapon against COVID-19, infections in 2020 in patients and outbreak of cases as virus social effects.

Moreover, using the "actant/acted" prism (see Figure 11), the coronavirus is more directly related to tourism than in Figure 10.

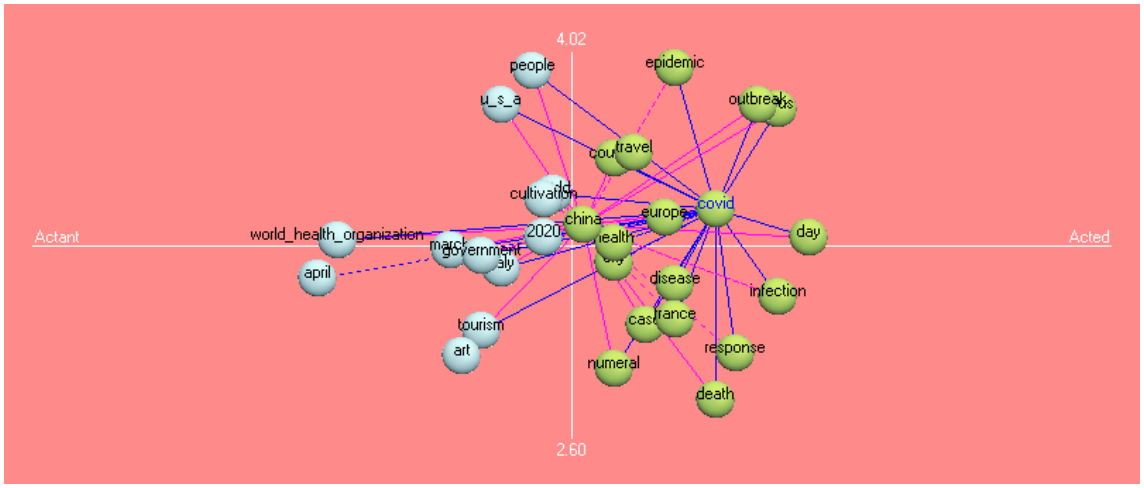

Figure 11 *"Axial" semantic-logical network showing "covid's" actant and acted social processes/sociological concepts*

In fact, in Figure 11, as in Figure 8, the researcher can more clearly observe the connections among the concepts involved, through the lines that transit from one concept to another. Major relationships are again indicated by solid lines and in blue, and less important links are marked via dotted lines.

For example, the relationship between COVID-19 and China is very strong, with this country emerging as a decisive factor for the outbreak and spread of the pandemic. The relationships between China and the other social phenomena are testified via the

connections in Figure 11, linking China to "covid", "epidemic", "outbreak", "people", "tourism", "U.S.A.", among others. Figure 12 quantifies those relationships.

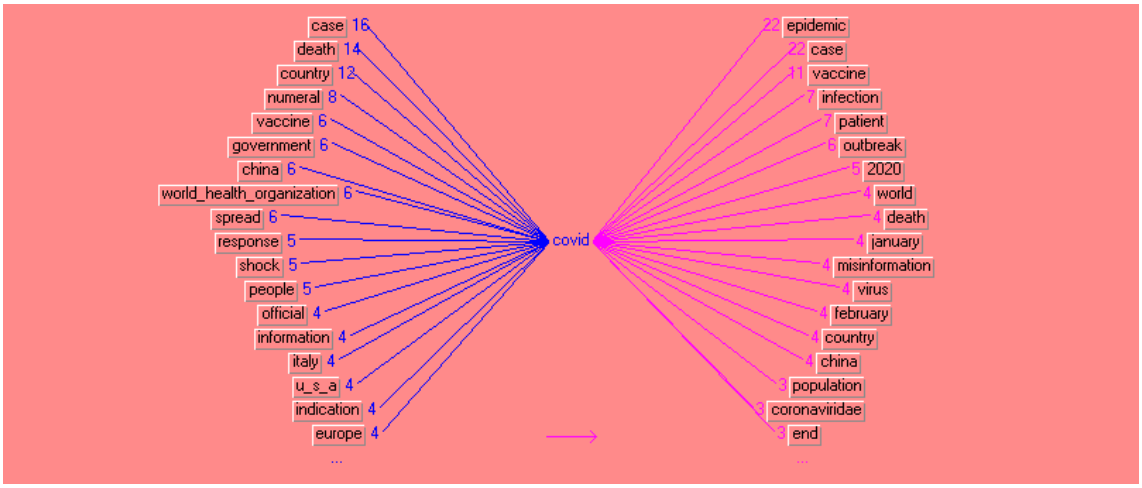

Figure 12 *"Star" semantic-logical network about COVID-19 with concepts frequencies*

Note that this interpretation strategy uses a concept, "China", which mediates two other dimensions of reality: a social structure ("tourism") and a social agent ("COVID-19"). This type of notion is named "mediating concept" or "concept-relation". Thus, a mediating concept means a scientific term that intermediates (relates substantively) polar terms, such as opposite concepts in terms of social levels (Andrade, 1991, p. 270). For example, the macrosocial level represented by the structure "tourism" and the microsocial level manifest via COVID-19 social agent, as exemplified above.

Below are shown some examples of the occurrences mentioned above and relationships expressed in the actual text in English. They were extracted from the corpus of the selected Wikipedia pages, specifically concerning the relationship between China and COVID-19, within a global conjuncture where tourism travels contribute to aggravating the pandemic. This is just an illustration, as the citations are very numerous in the corpus.

The following references can be found on the Wikipedia page about the COVID-19 pandemic. The numbers at the beginning of each indicate the order of the propositions after analysis.

Here are some citations on the spread of the virus through tourists:

- [11] On January 31, Italy had confirmed its first cases, two tourists from China.
- [7] International tourist arrivals surpassed the milestone of 1 billion tourists globally for the first time in 2012.
- [8], emerging source markets such as China, Russia, and the United States rather than from China where the virus originated.
- [733] Former US President Donald Trump was criticized for referring to the COVID-19 as the "Chinese Virus" and "Kung Flu".

In what regards the pandemic situation in 2020:

- [72] Nevertheless, the first reported death outside of China occurred on February 1 2020, in the Philippines.

- [307] As of July 14 2020, there are 83,545 cases confirmed in China, excluding 114 asymptomatic cases.

Official statements from the Chinese government agency on the virus:

- [34] By January 12 2020, five genomes of SARS-Cov-2 had been isolated from Wuhan and reported by the Chinese Center for Disease Control and Prevention (CCDC) and other institutions.

Animals as allegedly originating the virus:

- [231] However, in May 2020, George Gao, the director of the Chinese Center For Disease Control and Prevention, said animal samples collected from the seafood market had tested negative for the virus.

COVID-19 pandemic cases in China:

- [59] An analysis in early 2020 of cases by age in China indicated that a relatively low proportion of cases occurred in individuals under 20.
- [229] The following day, on December 31, The Who office in China was informed of cases of pneumonia of unknown cause in Wuhan.
- [229] According to official Chinese sources, the early cases were linked mostly to the Huanan Seafood Wholesale Market.
- [236] On January 20, China reported nearly 140 new cases in one day.
- [247] By March 26, the United States had overtaken China and Italy with the highest number of confirmed cases in the world.
- [307] As of July 14 2020, there are 83,545 cases confirmed in China, excluding 114 asymptomatic cases.

Deaths in China caused by coronavirus:

- [311] However, throughout the pandemic, multiple sources have cast doubt upon the accuracy of China's official numbers for deaths and infections of Covid-19 during the initial outbreak.
- [407] On March 19 2020, Italy overtook China as the country with the most COVID-19-related deaths in the world after reporting 3,405 fatalities from the pandemic.

7. Relational Analysis and Interpretation

A third big step of HDA is mainly relational. An application of the alphabet is presented in the next pages. In the corpus retained, 2,393 occurrences of relations extracted from this (socio)logical alphabet were found. (Socio)logical relations coded with "rs" signifies structural relations, such as the "globalization" relation, coded as "rs3 (((is global to". And (socio)logical relationships coded with "rc" are conjunctural relations, such as the "digital network transformation" relation, coded as "rc14 x-x> transforms in web".

Among the structural relations, the most frequent is the "equality" relationship, coded as "rs7 = equal to" and mentioned 506 times. In the second place appears the "wholeness" relation, coded as "rs1 (contains", with 150 references.

In the case of conjunctural relations, the "determination" relationship, coded as "rc1 ->> determines", is the most numerous, with 313 occurrences. The second more usual is the "movement" relation, expressed in the analysis as "rc4 -|-||> moves to", referenced 202 times. Other conceptual connections and their relative relevance in the corpus can be seen in Figure 13.

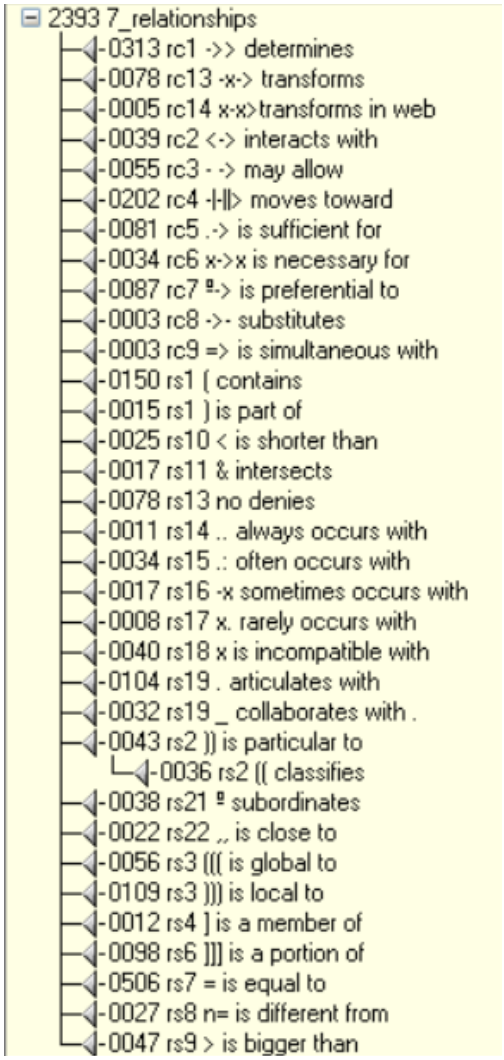

Figure 13 *(Socio)logical relationships among concepts*

The following networks show how a relationship may be connected with anterior and posterior concepts in the HDA method. For example, the "determination" relationship (Figure 14) is now taken as a core idea, thus placed at the center of the network.

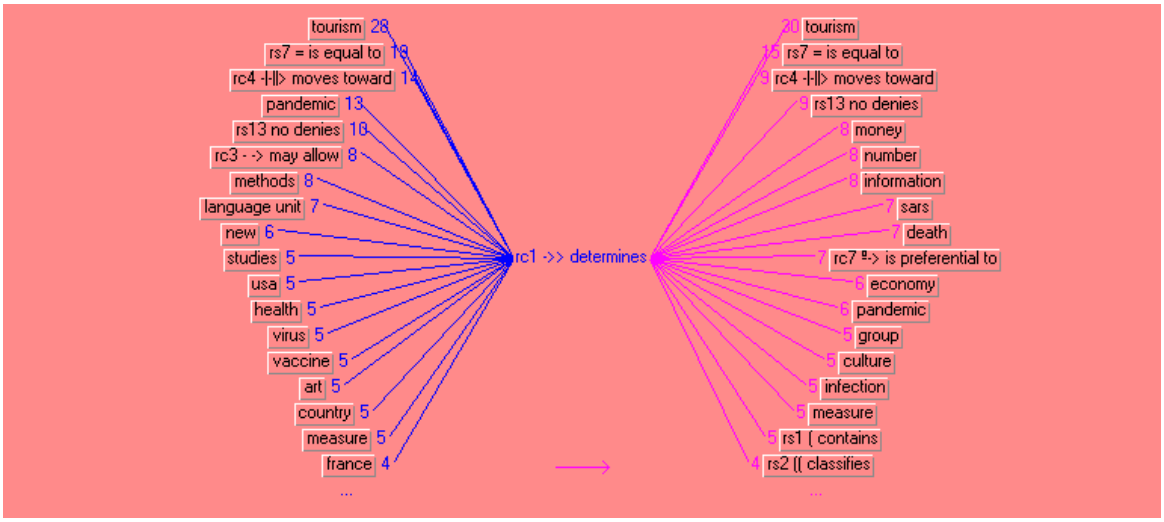

Figure 14 *Anterior and posterior concepts to relation "determines"*

In this way, the "determination" relationship gathers, at its left, antecedent concepts and, at its right, consequent concepts. In other words, the "determination" relationship is now understood as a relation-concept (Andrade, 2002). Furthermore, epistemologically, via this interpretative movement, the relation-concept acquires the status of a hybrid concept or, if you wish, the connotation of a hybrid relationship, as it hybridizes concepts with relations and vice-versa.

Some of the most frequently anterior concepts (sometimes acting as causes), connected with the "determination" relationship, are "tourism", with 28 occurrences; "pandemic" (13); "health" (five); "virus" (five); "vaccine" (five). The concept "tourism" is also the most cited posterior concept (20 times), located after the determination relation, inside all the propositions of the corpus. This means that the social process "tourism", in the corpus discourse, is more present as a conditioning factor than as a conditioned factor.

As for these posterior concepts (working, for example, as consequences of effects), some are relevant. For instance, "sars", "death", "pandemic", "infection", among others.

Another interpretation strategy is using transitivity more profoundly. As noted above, this means exchanging the researcher perspective in what regards the central concept within a (socio)logical network or across different networks. For instance, it is possible to switch to a network (see Figure 15) that takes one concept ("tourism") connected with a relation-concept (the dialectical relation coded as "rc13 transforms") as the network's core idea, thus located in the network center.

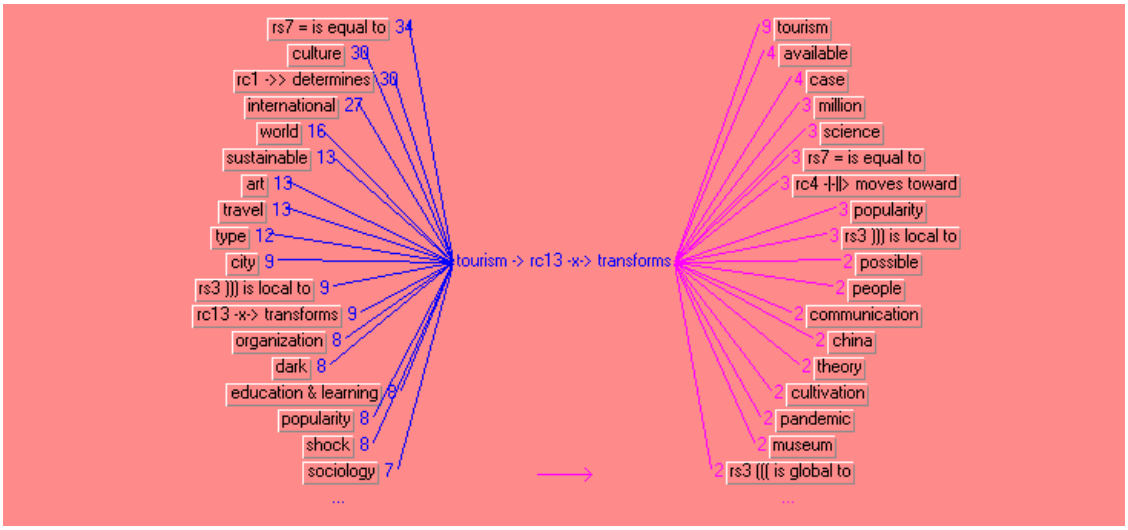

Figure 15 *Antecedent and consequent concepts to a proposition including the concept "tourism" and relation "transforms"*

This means that such center is itself hybridized, as it fusions a concept and a relationship into a partial proposition. Observe the frequencies of the antecedent and subsequent concepts in what concerns this new core idea. As for posterior terms, "tourism" may transform any one of them, for example, "people" and "communication", or the "pandemic".

Next, there are examples of the relationship "determination" in the considered corpus. The words in italic indicate the terms used in the English language of Wikipedia page on "COVID-19 Pandemic":

- [6] Reporting on March 24 2020, the Centers for Disease Control and Prevention (CDC) of the United States indicated The Who *had provided* two codes for Covid-19:
- [30] The virus that *caused* the outbreak is known as severe acute respiratory syndrome coronavirus 2 (SARS-Cov-2).
- [82] The death-to-case ratio *reflects* the number of deaths attributed to Covid-19 divided by the number of diagnosed cases within a given time interval (...) because comparisons of death rates before and during the pandemic show an increase in deaths, that is not *explained* by Covid-19 deaths alone.
- [84] The CDC *noted* that [the National Center for Health Statistics (NCHS)] is not planning to *implement* U07. 2 for mortality statistics.

Some illustrations of actual social language sentences, corresponding to these (socio)logical propositions within the Wikipedia page "Tourism", are shown below. Again, the terms that connote the two terms found, mutually associated, inside the same propositions, are marked with italics.

- [7] International *tourist* arrivals *surpassed* ["*surpassed*" is a word in the corpus indicating the "dialectical" or "transformation" relation] the milestone of 1 billion tourists globally for the first time in 2012.
- [8] *emerging* [another word in the class "transformation", in what regards *tourism*] source markets such as China, Russia.
- [9] Basis International *tourism* over time, modern aviation *has made it possible* to travel long distances quickly.

- [63] This form of *tourism developed* during the second half of the 19th century in the United Kingdom.
- [65] Educational *tourism is developed* because of the growing popularity of teaching.
- [106] Social *tourism* is *making* tourism available to poor people who otherwise could not afford to travel for their education or recreation.
- [138] *Tourism* products and services *have been made available* through intermediaries.

In addition, it might be interesting to research, as a network core idea, the hybridization between two relation-concepts (Figure 16).

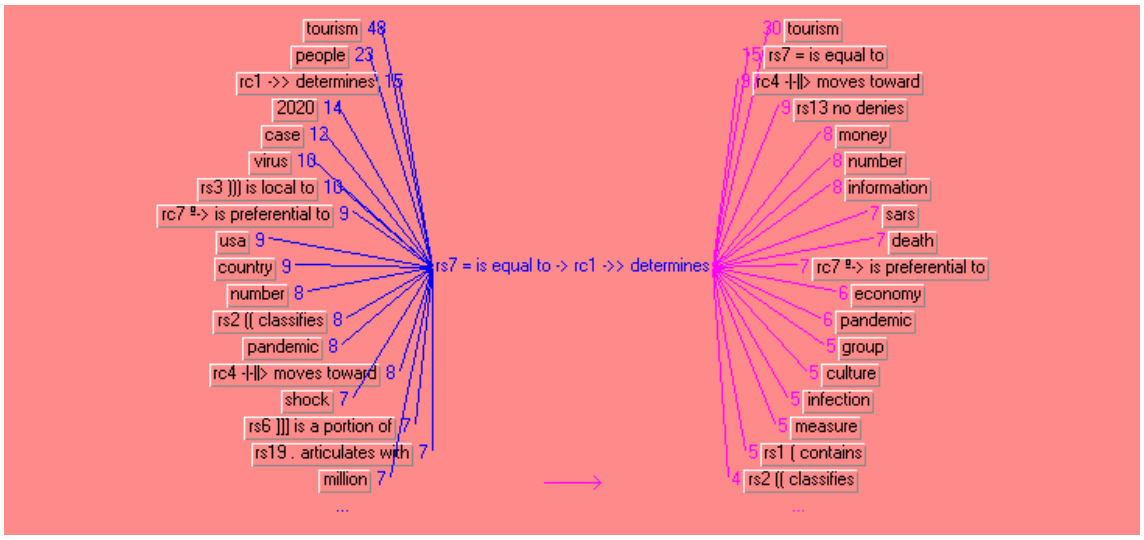

Figure 16 *Prior and following concepts to relation "is equal to" hybridized with relation "determines"*

For example, the association between, on one hand, the relation denominated "equality" (coded "rs7 = equal to") and, on the other hand, the relation "determination" (coded "rc1 -›› determines"). Such connection between two relations is named "meta-relation". It is now possible to discover some frequent concepts, or other relation-concepts, connected with this new core idea within a semantic-logic network.

For such a purpose, one could retake the whole linguistic sentences of the corpus and the respective underlying logical propositions. As stated above, such propositions include anterior concepts (e.g., conditions, causes) and posterior concepts (consequences, effects, etc.) connected by one or more relationships. In what regards the anterior concepts inside all (socio)logical propositions inside the corpus, the more frequent mentions include "tourism" (48 times), "people" (23), "virus" (18), "pandemic" (eight), and so forth. And the impact of this meta-relation contains "sars", "death", "pandemic", "infection", among others.

Examples of this meta-relation in the corpus are presented below, found inside the Wikipedia page on "COVID-19 pandemic". The relation "is equal to" is indicated in italics, and the relation "determines" is noted between quotation marks.

- [179] Nevertheless, in the United States, two monoclonal antibody-based therapies *are* available for early use in cases "thought" *to be* at high risk of progression to severe disease.

- [180] In 34% of cases (7,4% for those over age 65), symptoms *are* severe enough to "cause" hospitalization.
- [190] health care must *be* available to "provide for" the needs of those infected.
- [199] Contact tracing *is* an important method for health authorities to "determine" the source of infection.
- [200] and as of April 7 2020, more than a dozen expert groups *were* working on privacy-friendly solutions such as "using" Bluetooth to log a user's proximity to other in mandatory traveler information collection for use in Covid-19 contact.
- [208] In Europe and the US, Palantir Technologies *is* also "providing" Covid-19 tracking services.
- [210] in some areas, non-emergency healthcare services *are* being "provided" virtually.

Other citations with the meta-relation that hybridizes the relationship "is equal to" with relation to the connection "determines" are located within the Wikipedia page titled "Tourism":

- [60] Cultural tourism *is* one of the megatrends "reflected" in massive numbers of overnight stays and sales.
- [80] Tourist destinations *are* shifting to low carbon emissions following the trend of visitors being more focused on *being* environmentally responsible, "adopting" a sustainable behavior.
- [89] *There is* also the possibility of pro-poor tourism principles being "adopted", within community tourism in Sierra Leone?
- [91] and *this is* "reflected" in tourist numbers recovering some 6,6% globally over 2009, with growth up to 8% in emerging economies.

8. Conclusion

It would be possible to extend the HAD sociological hybrid hermeneutics about hybrid social processes via the above applied epistemological, theoretical, methodological and empirical perspectives. In fact, such a strategy is still in its early stage of development. Therefore, some previous and incomplete conclusions on the present study are the following: within an epistemological perspective, not only methods but everything in research could or should be, in some way, hybridized, at least partially. For instance, not just interdisciplinarity is pertinent nowadays; but clearer articulations among concepts and among theories as well; and also a more proficient fusion among research teams originary from dominant and alternative research cultures, for example, research teams native from both central and peripheral countries and societies.

From a theoretical perspective, web 3.0, and in particular social semantic sites such as Wikipedia, are objects of study relatively under-analyzed, despite the fact that Tim Berners-Lee (2000), the inventor of world wide web (the visual and graphic internet), has pointed out its core relevance and urgency for the clarification of digital social networks inherent phenomena.

Considering a methodological perspective, in order to interpret novel social processes, it is necessary not just to create innovative concepts but also to forge new

methodologies. Using the alphabet, HDA represents only a possible contribution to it, albeit in a state of development and therefore naturally under continuous evaluation.

Anyway, as temporary results of this case study, the following is noteworthy: for the authors of the analyzed web pages discourses, among the subjects associated with COVID-19 and tourism, and taking into account the quantitative approach applied, the more relevant social phenomena dimensions are structural, registering 3,845 mentions. The number of references to "relationships" and to "social agents" is relatively similar, with 2,394 and 2,335, respectively. The frequency of societal "contexts" and "processes" is also very close. "Objects" and "practices" are the least social and sociological dimensions/levels present in the Wikipedia discourse.

As for a more qualitative approach, and revisiting the questions previously formulated, the core concepts that represent these social phenomena dimensions seem to belong to the "medicine and health" category related with "social agents" and to refer to "transport and travel" connected with "tourism", which demonstrate the pertinence of their articulation. The more expressive social relations that articulate such concepts are "equality" inside structural relationships and "determination" within conjunctural relationships. Some of these are meta-relations, that is, social and sociological links that associate with other links. It is the case of "equal to", related, in a first move, to "determines", and both connected, in a second step, to several antecedent and posterior ideas, within the reticular discourse resident in Wikipedia pages about both "COVID-19 pandemic" and "tourism", a social discourse partially deciphered via the sociological propositions proposed by HDA.

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Appendix

Brief Glossary on Urban Tourism, Viral Society and Hybrid Discourse Analysis

The purpose of this glossary is to synthetically allow access to concepts related to the central theme of this text. Please note that such relations are not just direct connections but also of an indirect nature. For instance, they may constitute a relation of inclusion between a term and its broader categories that contextualize a more specific concept. In fact, a glossary does not have the same role as bibliographic references do, where direct relations between a citation and a source must be indicated. Differently, a glossary is useful for briefly defining and consolidating ideas, neither articulating all the terms with the text, nor developing a reflection on those terms, which would be impossible due to lack of space.

For example, in the present glossary, the concept "city 3.0" must be included in the broader category "city" or "urban", which constitute two hierarchical knowledge classes. Inside the definition of "city 3.0" it is possible to see a direct relationship with the case study about Wikipedia discourse, here analyzed, as Wikipedia is a semantic web included in the broader system of "web 3.0". Note that some (but not all) direct related concepts with "city 3.0", for example, "web 3.0" and "tourism 3.0", are noted in italics in the "city 3.0" definition. This means that the reader can be quickly and briefly elucidated with the meaning of these two last ideas. In sum, contemporary texts have a rhizomatic and intertextual nature. That is, they create an incomensurable network of interrelated signifiers. Glossaries are just a more synthetic rhizoma.

City 3.0 or social-semantic city: globalized locality configured in an urban geographic network that includes digital, social and semantic networks, characteristics of *web 3.0*, particularly in the activities of *tourism 3.0*.

Cultural tourism: type of *tourism* that is predominantly interested in cultural aspects of society (arts and their institutions or contexts), for example, the Museum of Public Art or other public cultural spaces, such as the street.

Digital cultural tourism: mode of *tourism* associated with cyberspace and cybertime, and the mobile culture conveyed by the tourist through the cell phone, for example, as an instrument for linking public arts to cyberculture.

Hybrid discourse analysis: is a critical and hybrid discourse analysis genre that undertakes fusions among the different natures of things while analyzing a given corpus of social data. For example, by hybridizing knowledge types, methodological approaches such as *hybrid methods*, pre-digital, digital media and *hybrimedia*, intercultural and interprofessional research teams, among others.

Hybrid methods/Hibrimedia: mixture, fusion or hybridization of diverse scientific, technological or artistic methods and media, for example, those that characterize the following modes of knowledge: social sciences (questionnaire, etc.), new technologies (interactive digital devices built in hypermedia) and the arts (object art, procedural art like installation and performance).

Hybridology: it consists of the scientific, technological and artistic study of the hybrid entities that abound and somehow define our globalized contemporaneity, as in the case of the growing demographic hybridization in European societies, through decades of massive immigration. Other examples are *hybrid methods, hybrid discourse analysis* and *hybrimedia*.

Innovative tourism: type of *tourism* linked to social innovation, especially within the urban mobility characteristic of the *smart city*.

Mobile locative tourism: configuration of *tourism* travel in which the information and knowledge about the trip (internet searches about the tourist destination, memories captured during the visit, etc.) are carried out mainly via mobile phone, in person at physical locations or virtually within sites online. The new mobilities characteristic of mobile locative and *viral risk tourism* redefine the current social mobilities. That is, they establish processes of remobility, which develop certain regularities already detected in the case of *tourism communication* via locative media and communicative tourism.

Research society: in contemporary times, ordinary citizens can openly search and (re)search through open research, both open information and knowledge, using global tools and devices, such as Google or cell phones, in various social scenes or arenas,

including physical or virtual museum spaces, or the street. In doing so, ordinary citizens can construct concepts and definitions, for example, on Wikipedia, and thus, somehow compete with professional scientists and artists, on the production and disseminaton of local and global information and knowledge.

Smart city: city paradigm that favors planning, monitoring and digital technologies to achieve greater predictability in urban restructuring, among other aspects of greater mobility, *innovative tourism* and security in public space. However, this ubiquitous view of the city and the citizen carries risks, from the intrusion into private life, through disrespect for human rights, to the naturalization and uncritical acceptance of a generalized panoptism. It differs from *city 3.0* as this urban mode is more profoundly connected with *web 3.0* and *tourism 3.0*.

Social remobility: it is defined as a posture to combat *viral society*, aiming at overcoming it and the alternative recreation of social mobility processes amid contemporary social and communicative processes, such as communication among citizens, tourists and migrants. In a *viral society*, social demobility occurs. In other words, the mobile society, in which "everything is on the move", as John Urry (1990, 2007) puts it, has partially transformed itself into a motionless society. Therefore, it is necessary to de-move it from its i-mobility, through social remobility, among other strategies. Some examples of these social re-mobilization processes are urban public art linked to mobile cultures, such as tourist culture and cultures inherent in digital social networks. Such cultures are founded and merged, today, in virtual-viral communities that circulate in cyberspace and cybertime, which are conflicting digital public spheres where, presently, pre-viral societies deconstruct and gradually reconstruct themselves as post-viral societies.

Social-semantic website: this type of digital site is closely associated with *web 3.0*. It explicitly presents an explanatory paradigm or sections on its own semantic content (ideas, concepts, facts, events, etc.) and its logical relationships (connections between ideas within the site, or links between pages on the site or between these and places, external to him on the internet).

Tourism: mode of travel dominant within industrial societies and modernity. Types of tourism include *cultural tourism, digital cultural tourism, innovative tourism, mobile locative tourism, tourism 3.0, viral risk tourism*.

Tourism 3.0: it is defined based on the following traits: greater interest by tourists in intangible heritage; overcoming the dichotomy between high culture and popular culture, a process for example witnessed by the opening of tourists to public art on the

street; hybridization between cultural production and consumption; desire for authentic experiences in the tourist trip; such a paradigm of modern *tourism* is revealed as one of the practical manifestations of *city 3.0*, which often allows the use of *culture 3.0* within the public cyberspace of *web 3.0*.

Tourism communication: communicative paradigm around *tourism* activities, founded on three distinct modes of communication, but also hybridized in contemporary times: the pre-modern mode of communication in co-presence (face-to-face conversations, etc.); the mode of mass communication characteristic of modern societies (press, radio, television); and the digital communication mode associated with postmodernity (cyberspace, cybertime).

Viral society: society paradigm defined by societal processes never seen before, such as viral economies and technologies; viral policies and politicians; viral cultures and cults, *viral risk tourism*. One of the processes that seek to overcome the viral society is *social remobility.*

Viral risk tourism: this process is defined as a new mode of traveling that inherits some of the characteristics of *viral society*, risk society and network society. For example, due to forced confinement, potential tourists increasingly choose to make virtual travels in cyberspace and cybertime rather than physical travel. Another attribute of viral risk tourism is the development of *mobile locative tourism*, which can become as or more important than presential tourism.

Web 2.0 (or social web or reading/writing internet): type of digital social network that allows an active posture on the part of the user: in addition to reading the information, he can write content such as articles (posts) or comments on a blog and share personal and professional information on digital social networks, such as Facebook, Twitter or YouTube.

Web 3.0 (or semantic web): paradigm of digital social networks that is based, among other discursive devices, on *social-semantic sites*. For example, Wikipedia, Freebase, Public Communication of Art sites.

Wikipedia: a social semantic *web 3.0* site, in the form of a global digital glossary, where common citizens may define ideas and concepts, even if evaluated by a Wikipedia commission, dedicated to controlling some anti-democratic practices and writings, such as racist postures, fake news, among others.

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Pedro Andrade is a sociologist and researcher at the University of Minho, Communication and Society Research Centre. He was a teacher at the Universities of Coimbra and Lisbon, on sociology of culture, communication, sociological methods, digital humanities. He researches about urban cultures, art communication, art/science museums, literacies, digital social networks (web 2.0/web 3.0), methodologies/hybrimedia. He was a coordinator of international projects, for example, *Scientific-Technological Literacy and Public Opinion* (2005, on science museums publics) and *Public Communication of Arts* (2011, about art museums and its relationships with audiences, tourism, digital/virtual sociological methodology, hybrimedia interaction, sociological/cultural games, social networks, virtual/augmented reality), both funded by the Fundação para a Ciência e a Tecnologia. Participation within international university webs, for example, Virginia Commonwealth University, United States; member of the project *Manifesto Art and Social Inclusion in Urban Communities* (United Kingdom). He is an author of several books and scientific papers published in international and national journals with peer review, indexed in global bibliographic databases (Web of Science, etc.). He is the director of the first Portuguese-French scientific journal, *Atalaia-Intermundos* (since 1995).

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Digital Political Communication in the Portuguese-Speaking World: Platformization and Engagement

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Abstract

This article provides an exhaustive analysis of the emerging digital political communication strategies in a seldom-studied area: the Portuguese-speaking world. Through a literature review and content analysis, 25 political parties from five countries and three different continents are studied. The results confirm emerging trends common to other recently analyzed places, such as innovation in digital storytelling, platformization and the trend towards engagement as communicative interaction. However, there are new trends toward instant messaging, podcasting, audience segmentation and engagement linked to the fight against fake news.

Keywords

communication, political communication, digital, engagement-audience-political-party, Portuguese, Lusophone, social networks

Comunicação Política Digital na Lusofonia: Plataformização e Engajamento

Resumo

Este artigo oferece uma análise exaustiva das estratégias emergentes de comunicação política digital numa área pouco estudada: a lusofonia. Mediante revisão bibliográfica e análise de conteúdo, foram estudados um total de 25 partidos políticos de cinco países e três continentes diferentes. Os resultados confirmam, por um lado, tendências emergentes comuns a outras áreas geográficas analisadas recentemente, como a inovação nas narrativas digitais, a plataformização e a tendência para o engajamento como interação comunicativa. No entanto, são observadas novas tendências como o uso de mensagens instantâneas, o podcasting, a segmentação de audiência e o engajamento vinculado à neutralização de notícias falsas.

Palavras-chave

comunicação, comunicação política, digital, engajamento-audiência-partido político, português, lusofonia, redes sociais

1. Digital Political Communication

The intensive use of technology (Enli & Moe, 2013) is reshaping the public sphere (McNair, 2017) and thus the situation and structure of one of its main actors: political parties. During the last 3 decades, they have been immersed in changes driven by technological innovations (changing strategies, the growing influence of major technology companies on their actions, the emergence of new political actors and disinformation), which sometimes challenge the distribution of power and civil society. These developments have been especially significant in communication with other actors and enhanced during the pandemic (Landman & Splendore, 2020) and hold uncertain consequences for democracy (Grossman et al., 2020; Webler & Tuler, 2018).

After the first few years in which digital communication served only to publish online messages developed for offline reality, political parties soon discovered the importance of digital strategies in elections. They adopted hybrid strategies that combine old and new media in their relationship with their audiences (Chadwick, 2013). In the beginning, overlapping content on different supports prevailed, but along the way, political parties have sought innovation in language and storytelling, an effort which has led to crossmedia narratives, transmedia and even immersive reality (García-Orosa, 2019),

The intensive use of social networks (Popa et al., 2020) supported by big data is particularly salient in election campaigns as a vehicle for communication and forecasting.

The nearly uncritical use of social networks has been closely linked to one of the political parties' main goals: engagement with their audiences, to the point that some authors describe the current era as that of engagement (Morehouse & Saffer, 2018). Within this development, strategies that seek audience engagement stand out, sometimes as a yearning for the democratization of participation and democratic debate and, on other occasions, simply as a new source of economic resources (García-Orosa, 2018).

Still, engagement lacks a sound theoretical model (Shen & Jiang, 2019). Definitions stemming from different areas of knowledge encompass concepts ranging from the assimilation of engagement with interactivity to those linked to psychological engagement and philosophy with the construction of behaviors with different levels of hierarchical activity ranging from passive message consumption to active two-way online conversation, participation and recommendation (Men & Tsai, 2013; Taylor & Kent, 2014). Dhanesh (2017) proposes two main conceptualizations of engagement: (a) communicative interaction manifested as clicks, likes, views, shares, comments, tweets, recommendations, and other user-generated content; and (b) dichotomous notions of engagement as control based on transactional modes of communication (public information, two-way asymmetry, organizational message dissemination) and engagement as online collaboration based on participatory modes of communication (dialogue, content co-creation, etc.).

In practice, political parties continually seek audience participation and engagement in many ways. There has been, to date, a discrepancy between the practice of engagement and the discourse surrounding it and the lack of a real incentive for citizen participation, assigning users the role of re-disseminator without insisting on their involvement or responding to their interactions (García-Orosa, 2018). However, in recent

years, given the inability to control the messages users publish on social networks, parties seek cooperation in disseminating common arguments through different strategies for attracting digital volunteers alongside the traditional search for supporters, affiliates and donors. Take, for example, the Republican Party in the United States, which in 2018 began assigning online tasks to its digital activists (e.g., following the party on networks, sharing their messages on users' profiles and helping to grow the team of digital activists) and conventional activists (registering new voters and hosting local party events). The Democratic Party called its supporters to action by including a directory, several causes and a guide for calling the corresponding Republican representative to convince them to vote a certain way.

At the same time, citizens were looking for new ways of participating in politics, such as the electoral groups in Spain or the media and the public sphere.

Nonetheless, parties and activists risk making digital political communication monotonous and propagandistic, with scant attention paid to the functions of civic or democratic deliberation. One of the most recent risks can be seen in the mise en scène of a new actor: digital platforms. Daniel Kreiss and Shannon C. McGregor (2018) have analyzed how Facebook, Twitter, Microsoft and Google served as advisors to political parties and shaped digital strategy, content and execution of campaign content through the development of organizational structures and staffing practices tailored to the dynamics of American politics.

Many dynamics have been identified, but most of the studies carried out thus far deal with European or American political systems. This article provides a comparative analysis of countries on three continents scarcely examined in the existing literature.

In terms of communication, the analyzed period is framed in the fourth wave of digital political communication, which is characterized by: (a) digital platforms as political actors participating in all phases of communication; (b) the intensive use of artificial intelligence and big data in all phases but especially during campaign season; (c) the consolidation of falsehood as a political strategy (among other fake news and post-truth phenomena); (d) the combination of hyperlocal elements with supranational ones; (e) uncritical technological determinism; (f) the search for engagement with audiences and co-production processes; and (g) three trends that pose challenges for democracy: polarization of opinions, echo chambers and filter bubble (García-Orosa, 2021).

2. The Study of Political Communication in the Portuguese-Speaking World

As seen in the above-cited literature on the advancement of scientific knowledge, the Portuguese-speaking world is scarcely represented despite a significant increase in research by or about this community in recent years (Gradim et al., 2018).

This article addresses studies conducted in recent decades on the Portuguese-speaking world as a "figure of geostrategic and cultural interest and the digital media as an object of analysis" (Martins, 2015, p. 27). This article will use this perspective to analyze a major actor in the public sphere: political parties.

Portuguese has more than 250,000,000 speakers who have little sense of belonging to a community. As Martins (2016) recalled, it is a place without a voice, knowledge or recognition of similarities in this vast geographical, cultural and media space (an idea also shared by Góes & Antunes, 2017; Seixas, 2016).

These limitations are also reflected in the academic field of communication, with 25 entries in the Web of Science database, mostly from Brazil and Portugal (52% and 56%, respectively) in 2021. Furthermore, only 8% of research originates in communication sciences (compared to 26% in the humanities or 24% in linguistics). Given the small number of articles, the year over year pattern is quite irregular.

Within political communication, studies are divided into three categories: those that adopt a historical perspective (Gaudin, 2020; Izquierdo, 2017), those that perform comparative analyses between a Lusophone country and a non-Lusophone country or countries, and those that analyze the 2018 Brazilian elections focusing fundamentally on a specific technology. In the second case, it stands out García-Orosa et al. (2017) study comparing digital narratives in Portugal and other European countries, or Ituassu et al. (2019) study that compared the 2016 American elections with the 2018 Brazilian elections. Finally, in the last case, it stands out Canavilhas et al. (2019) novel study that analyzed the use of WhatsApp and demonstrated that at least 60% of messages contained wholly or partially false information. These findings corroborate the existence of a web of desinformation among WhatsApp users.

This study analyzes Portugal, Brazil, Cape Verde, Guinea-Bissau and Mozambique.

In addition to allowing us to observe the transformations that technology, among other factors, triggers in political communication in seldom studied contexts, this analysis allows us to incorporate cases from continents besides Europe and the Americas.

3. Methodology

The main objective is to study the digital political communication of political parties. The main political parties with parliamentary representation in 2021 are from Portugal (Socialist Party, Social Democratic Party, Portuguese Communist Party, Left Bloc, CDS – People's Party, People-Animals-Nature Party); Brazil (Workers' Party, Social Liberal Party, Progressives, Brazilian Democratic Movement, Liberal Party); Cape Verde (Movement for Democracy, Independent and Democratic Cape Verdean Union, African Party for the Independence of Cape Verde), Guinea-Bissau (Movement for Democratic Alternation, Social Renewal Party, United People's Assembly-Democratic Party of Guinea-Bissau, African Party for the Independence of Guinea and Cape Verde) and Mozambique (Mozambique Liberation Front, Mozambican National Resistance, Mozambique Democratic Movement).

First, we will set forth how the parties define digital communication, their strategies for using the online toolkit and the conception of their audience. We reviewed online party documents that contained their mission statements and principles and their bylaws and declarations of intent.

Lastly, we analyzed their digital strategies. The variables have been elaborated ad hoc for this research based on those used in similar studies (García-Orosa, 2018; Keller & Klinger, 2019; Landman & Splendore, 2020) to provide an in-depth analysis of digital media in political communication:

- the party's website;
- the conception of digital communication and audience relations;
- specific segmentation of audiences;
- clear indicators of the presence of Portuguese speakers;
- languages and international perspectives;
- innovation in storytelling and narratives (multimedia, transmedia, crossmedia, podcasts, 360°);
- fact-checking strategies;
- artificial intelligence;
- gamification;
- social networks;
- instant messaging systems;
- evolving professional skillsets;
- engagement with message receivers
- community (belonging to a community, community restricted to party activists);
- adaptation to COVID-19.

4. Results and Discussion

Within the trend toward reconfiguring the public sphere through technology (McNair, 2017), the political parties analyzed herein also make extensive use of technology, especially social networks and instant messaging. The internationalization of platforms leads to homogeneity in how they are used, their implementation times and even their uptake rates. We have also observed the process of platformization in this study's sample with the homogenization of the use of social networks and instant messaging and the influence on the praxis of political communication.

In line with previous studies, political parties mostly resort to crossmedia to disseminate their messages, that is, simultaneous dissemination across several channels, but without major adaptations in language or discourse. The parties analyzed tend to emphasize audiovisual content, mainly through YouTube. Particularly noteworthy is their reliance on audio content, both in podcasts and on platforms such as SoundCloud.

Portugal's Social Democratic Party leverages hybrid communication by combining its digital archive of documents and the online publication of a traditional print magazine, complete with a podcast and TV channel.

Engagement, understood as a commitment between the public and the party, is the traditional link between the citizen and the party, mainly through affiliations and donations. The parties' websites imply that to be a citizen is to fund the party or disseminate

the party message, not help create content or formulate policy. Therefore, communication is largely one-way and asymmetrical (except for occasional contact through social networks and instant messaging) and does not affect the essence of the policy or the production of the message.

Consequently, the receiver, in this case, citizen, as a product of representation, an imagined entity of discourse that expresses itself through the enunciation of another discourse (Ducrot, 1980/1986), influenced by the media and public logic in the construction of its image. It reveals an audience mostly defined by political parties as recipients of messages and with a commitment uniquely defined by the continuity and fidelity of reception (newsletters) and economic contributor to the functioning of the party.

Engagement with the audience is unidirectional and is also linked to donations (Social Democrats of Portugal) or membership, examples of which abound (Portugal's Left Bloc, CDS – People's Party — Portugal; the Workers' Party — Brazil). In other cases, participation is equated with attending events (People-Animals-Nature, Portugal).

Still, these parties present some peculiarities compared to parties in previous research, the first being the segmentation of message receivers. Traditional segmentation (activist or supporter as in the Portuguese Socialist Party) combines with other characteristics depending on each area's context and each party's goals, but, which, in no case, are shared or common to the Portuguese-speaking area. Noteworthy segmentation includes "youth" and "women" in the Left Bloc (Portugal), Social Liberal Party (Brazil), Progressives (Brazil), and the Brazilian Democratic Movement. Furthermore, Portugal's Left Bloc has created a 60+ group and an lesbian, gay, bisexual, transgender queer and intersex group. Brazil's Progressive Party and the Brazilian Democratic Movement create segments for the Afro-Brazilian community, and Cape Verde's Movement for Democracy sets aside a space for the Lusophone diaspora. Nonetheless, in every case, segmentation exists within a traditional, unidirectional and asymmetric communication model that relies on segmentation only to offer information that could be of special interest to these groups. However, it is worth highlighting an exception: the Workers' Party (Brazil) community that arose under the name "Center for Fighting Fake News in Your City", in which the organization does not revolve around group identity but rather exists to address a specific issue where the political party operates. Therefore, the interaction with the user is selective.

We did not detect any significant steps towards engagement based on transactional modes of communication (instead of bidirectional asymmetry), and the parties seem to distance themselves from engagement understood as online collaboration based on participatory modes of communication, such as dialogue and co-creation of content, among others (Dhanesh 2017).

Nor did we find any signs of a search for engagement beyond the technological perspective or considered as another element of the communicative process allowing the user's participation in all phases of the production process and influence on the content, with a few exceptions beyond the use of big data to adapt the information to users' behavior and feelings. The search for engagement with the receiver is, above all, an

important source of marketing and dissemination of information and is not very relevant to the essence and process of the parties' communication.

The use of social networks stands out, though still without a common strategy that could prove critical for developing context-specific strategies in the coming years (Linke & Oliveira, 2015). There appears to be a need for an integrated social media strategy for distinct audiences, as has already happened successfully in other areas.

The distinguishing feature lies in instant messaging on Telegram and Skype (each used by 4% of parties) and WhatsApp (20%; Figure 1).

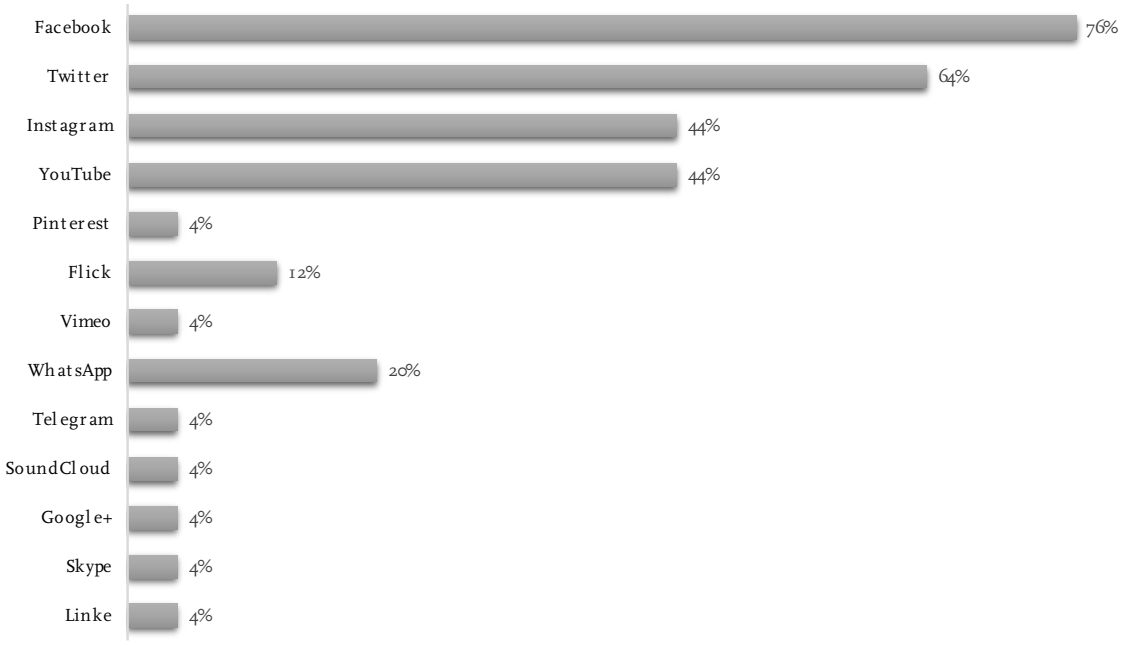

Figure 1 *Use of instant messaging documented in previous research on the Lusophone world and podcasting*

Except for the prominent use of Flick in Portugal and Instagram in Portugal and Brazil, we did not detect any country-specific trends (Table 1); rather, they mostly resemble trends observed in studies conducted in different parts of the world.

Political Party	Facebook	Twitter	Instagram	YouTube	Pinterest	Flick
Socialist Party (Portugal)	Yes	Yes	Yes	Yes	Yes	Yes
Social Democratic Party (Portugal)	Yes	Yes	Yes	Yes	No	Yes
Left Bloc (Portugal)	Yes	Yes	Yes	Yes	No	Yes
Portuguese Communist Party (Portugal)	Yes	Yes	Yes	Yes	No	No
Unitary Democratic Coalition (Portuguese Communist Party - Ecologist Party "The Greens"; Portugal)	Yes	Yes	Yes	Yes	No	No
People-Animals-Nature (Portugal)	Yes	Yes	Yes	Yes	No	No
Worker's Party (Brazil)	Yes	Yes	Yes	Yes	No	Yes
Social Liberal Party (Brazil)	Yes	Yes	Yes	Yes	No	No
Progressistas (Brazil)	Yes	Yes	Yes	Yes	No	No
Brazilian Democratic Movement (Brazil)	Yes	Yes	Yes	No	No	No

Liberal Party (Brazil)	Yes	Yes	Yes	No	No	No
Movement for Democracy (Cape Verde)	Yes	No	No	Yes	No	No
African Party for the Independence of Cape Verde (Cape Verde)	Yes	No	No	No	No	No
Democratic and Independent Cape Verdean Union (Cape Verde)	Yes	No	No	No	No	No
Movement for Democratic Alternation (Guinea-Bissau)	Yes	Yes	No	Yes	No	No
Assembly of the People United (Guinea-Bissau)	Yes	Yes	No	Yes	No	No
Liberation Front of Mozambique (Mozambique)	Yes	Yes	No	No	No	No
Mozambican National Resistance (Mozambique)	Yes	Yes	No	No	No	No
Democratic Movement of Mozambique (Mozambique)	Yes	Yes	No	No	No	No

Table 1 *Use of social networks by political party*

Finally, media and technical innovations are adapting to the circumstances, especially regarding mobile phones and newsletters for dissemination, while automation, immersive storytelling and transmedia strategies continue to stand out as emerging and underutilized techniques. Thus, the media consist of fundamentally asymmetric and asynchronous communication flows, with advances in storytelling and a small number of communities as in other recently studied areas (Serrano et al., 2020).

Consequently, political parties tend to dominate communicative and political action and use the public as a passive receiver, except for the option to interact through social networks and instant messaging.

In this regard, as seen in most results from political communication studies on political parties in recent years, two social networks stand out: Twitter and Facebook, used by 76% and 64% of parties, as seen in Figure 1. As was the case in other studies beyond the Lusophone world, Instagram and YouTube come in second place (44%).

Engagement takes the shape of communicative interaction, which manifests itself in clicks, likes, views, shares, comments, tweets, recommendations and other user-generated content. That is far from the notion of engagement as control based on transactional modes of communication (public information, bidirectional asymmetry, dissemination of organizational messages) or engagement as online collaboration based on participatory modes of communication (dialogue, co-creation of content, etc.), as posited by Dhanesh (2017).

Political parties link technology to their marketing strategy in specific areas of their webpages, in their founding principles and their implementation of information and communication technologies, especially on social networks.

Finally, except for the use of a common language, there is no sign of any emergence of a Lusophone community, whether in the political discourse analyzed or in the salient political communication trends, that differentiates them from others recently studied, in addition to those noted above.

5. Conclusions

This study assumes digital communication plays a significant role as a communication process and as a weathervane for political phenomena (Braga et al., 2017) during the fourth wave of digital political communication. This salient moment should also be analyzed in several contexts of the Lusophone world. Emerging trends common to other recently studied geographical areas are confirmed, such as innovation in digital storytelling, platformization and the trend towards engagement as communicative interaction. However, there are new trends towards instant messaging, podcasting, audience segmentation or engagement linked to the neutralization of fake news, some of which are summarized below.

The relationship between public actors and digital platforms, known as "platformization" (Smyrnaios & Rebillard, 2019), is increasingly close and asymmetric in political parties worldwide. Social networks are implemented homogeneously, as are their production and communication logics influence the party's identity and its relationship with the receivers of its message. As detected in the studies conducted mainly on the United States and European political parties, Twitter and Facebook are incorporated in most parties' websites and, therefore, in their narratives. The recent trend toward more audiovisual content is also confirmed in this study with the parties' extensive use of Instagram and YouTube.

Underlying the homogeneous and nearly uncritical implementation of social networks is the need to reach an increasingly distant public and create long-term engagement with them. However, the results describe communication flows that are fundamentally asymmetric and asynchronous, with advances in storytelling and a limited number of communities, as seen in other recently studied areas (Serrano et al., 2020). Engagement is the traditional link between the citizenry and political parties, manifested mainly in affiliations and donations. On their websites, the parties imply that being a citizen is to finance the party or help disseminate the party's message, not to create content or formulate policies.

As indicated above, storytelling is becoming increasingly crossmedia, though transmedia storytelling and virtual reality in storytelling have yet to pick up steam.

The parties analyzed in this study stand out for their use of instant messaging, podcasts, audience segmentation and engagement linked to combatting fake news. This segmentation, nonetheless, is always linked to the characteristics of the message's receiver, much less so to live chats and never to the receiver's relationship in the communication process.

In any case, a shift towards hybrid communication strategies can be gleaned with selective interaction that neither affects the power structures of political parties nor allows citizen participation in the organization's make-up or identity but allows only the modification imposed by technological platforms in the limitations and homogenization of the form communication can take and the content it entails.

6. Limitations

This research provides unpublished data on a previously unstudied area, and its results should be built upon with longitudinal studies in the coming years. Likewise, this work will be complemented with the analysis of other political actors, such as citizens or media outlets, and comparative studies with other linguistic communities.

Translation: Nathan C. Rhodes

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Biographical Note

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Conceptual and Methodological Interconnections in Communication, Journalism, and Gender Relations Research

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Abstract

In this article, I reflect on the impacts of theoretical and methodological contributions developed in gender relations studies to overcome heuristic limits in communication and journalism research. After analyzing studies on how the media covers physical and symbolic violence against women, events related to homophobia and its consequences, and the first cases of acquired immunodeficiency syndrome made public, I indicate how the social dynamics in gender relations can be potential disruptors of certainties. However, my analysis of these studies revealed that we could find limits and formulaic repetition in gender relations research as well, leading me to a challenge: how can we deal with repetitions that tend to disregard particularities of phenomena in communication, journalism, and gender relations research, also considering the potential interconnections in these fields?

Keywords

communication, journalism, gender relations

Interconexões Conceituais e Metodológicas em Pesquisas Sobre Comunicação, Jornalismo e Relações de Gênero

Resumo

Neste artigo, reflito sobre as contribuições de noções teóricas e aportes metodológicos de estudos sobre relações de gênero para a superação de limites heurísticos em pesquisas sobre comunicação e jornalismo. A partir de investigações sobre coberturas noticiosas relativas a violências físicas e simbólicas contra mulheres, a acontecimentos que envolvem a homofobia e suas consequências e aos primeiros casos de síndrome da imunodeficiência adquirida tornados públicos, indico o quanto as dinâmicas sociais das relações de gênero são potencialmente disruptoras de certezas. No entanto, o aprofundamento das pesquisas mostrou limites e repetição de fórmulas também em pesquisas sobre as relações de gênero, levando-me a um desafio: como lidar com repetições que tendem a desconsiderar particularidades dos fenômenos sob investigação nas áreas da comunicação, do jornalismo e das relações de gênero, inclusive em suas possíveis interconexões?

Palavras-chave
comunicação, jornalismo, relações de gênero

1. Introduction

By analyzing gender relations in communication processes over the last few years, I was able to identify theoretical and methodological limits in some conceptual contributions focused on understanding communication and journalism. For example, I have investigated journalistic coverage of femicides and other forms of physical and symbolic violence against women and also events that have their informational motivation centered on homophobia and its individual and social consequences, including connections made between acquired immunodeficiency syndrome (AIDS) and human immunodeficiency virus (HIV) with homosexualities. I credit the strength of gender relations as inspirational ruptures in how we think about communication and journalism for at least two reasons and their potential developments. First, events related to gender relations can implode biased logic of observation in those fields. On the other hand, concepts employed in gender studies allow us to revisit conceptual clichés and methodological formulas that are applied without considering the analyzed communicational and journalistic phenomena' specificities.

However, as I delved deeper into empirical research and bibliographical reviews on gender relations studies, the same discomfort I felt with conceptual and methodological formulas used in some communication and journalism works arose since I also noticed similar repetitions in gender relations studies. Hence, originating from a double discomfort, this article reflects on what I consider a necessary critique of theorizations in both communication and journalism fields, as in gender relations studies. The care we must take lies in not reproducing theories and methodologies as if they were supposed to have universal applicability as if they were independent of the demands that each research presents in its specificities.

Gender relations imply much more than questioning if biologism and binarism are really founded in physical differences, in genitalia and hormones that would define men and women. But neither are these studies confined to recognizing political, cultural, behavioral, intersectionality, and other dimensions that constitute the advancement of gender comprehension compared to sex and sexuality. Gender relations also imply considering people who claim that sexuality, sexual practices, or both are not pivotal pillars of their existence. Therefore, when dealing with gender relations perspectives, we are faced with the necessary care of decentering and dessentializing all identity claims as innate or obligatory. Moreover, here, I do not take innate as something that corresponds exclusively to physical traits from birth, as I also include features and characteristics that are supposedly considered mandatory for gay, lesbian, bisexual, transgender, and asexual people, among others. My objective is to notice, in the scope of gender relations, intricate modalities of approaches and detachments, of convergences and divergences

that, from the start, question any thinking pattern that holds its foundations in opposing man and woman, masculine and feminine, masculinity and femininity.

However, and what I will say certainly represents a most likely insurmountable contradiction, it is not possible or even desirable to refuse identities for political reasons at least. We should refuse identity essentialisms, as, instead of allowing mobilities, they impose characterizations that are often centered on binarisms that should have already been overcome. From this perspective, ideas like identity transit or identities in transit could function as undesired shortcuts that hamper the perception of how people comprehend their own gender, affective, and sexual experiences. Consequently, Zygmunt Bauman (2004/2005) noted, to claim identity is to deal with an ambiguity situated between what allows me to affirm who I am and, simultaneously, what allows me to offer my otherness to those who do not recognize it. It is a process that, at its limits, could even be used to justify my elimination or to undermine me morally and ethically because of my identity characteristics.

Reflecting on gender relations demands a sensibility to recognize that it is not possible to research gender without facing the cruelest and most sophisticated forms of physical and symbolic violence and intense power struggles. On the other hand, it also means realizing that numerous actions, strategies, and confrontation tactics are performed by people who do not admit social control mechanisms, who do not admit hierarchies that promote dehumanization or any kind of prejudice, abuse, or offense, and diminishing. Communication and journalism research, including their related processes and products, requires attention and care to avoid the dualism found in one-sided influence processes and the need to consider intricate power struggles, controversies over meanings, ambiguities, and contradictions. What gender relations, communication, and journalism have in common are human realities shrouded in polemics, fractured before any consensual possibility. They are research fields that present their own challenges when approached individually, though considering their possible interconnections increases their complexities.

This article aims to reflect on, as it seems to me, a moment of theoretical and methodological sedimentation in gender relations, journalism, and communication research, despite the fairly recent potential interconnections between these fields. If I am not mistaken, the repetition of explanatory schemes and methodological strategies has been overlapping the inquiry on what is the true heuristic potential of the concepts used in these fields and a much-needed methodological renewal that takes specific contexts and demands into consideration. As Silvia Rivera Cusicanqui (2018) suggests, we must avoid using "magical words", which she understands as concepts that, when mentioned, appear to hold only proper meanings that would not deserve criticism or revision, for example, the idea of social movements that she criticizes in her text. Because they are alluring and capable of creating "an effect of fascination and collective hypnosis" (Cusicanqui, 2018, p. 95), magical words hinder the search for multiple, sometimes dissimulated, meanings. They also represent ways of intellectual colonization, either when we accept

imported concepts without considering our particular contexts or when they become explanations that the academic world imposes on groups that are deliberately excluded from the formal instances of knowledge production. Such is the case of transgender people, which still represent a small share of the university bodies, to mention only one group of the LGBTIQAP+ universe (lesbian, gay, bisexual, transgender, intersex, queer, asexual, pansexual, and other non-heteronormative people). These people are the main targets of diminishing hierarchies, prejudice, and violence that feed the logic of gender relations.

Overcoming the limitations that magical words impose on us is a long-term challenge that I could not try to solve in this article completely. What I will do is indicate some works in which I could identify fractures and incompletenesses — in some cases, severe heuristic deficiencies — related to the concepts in question. Furthermore, I will refer to some widely used concepts whose acritical repetition often leads to works reaching conclusions before conducting their analyses, methodologically forcing the examined reality to submit to the concepts. These concepts should be reappraised in light of the specificities of what is in research, combined with a simultaneous attempt to renew the chosen methodologies. In other words, it is imperative to question concepts and methodologies whose starting points are also their finishing lines.

2. Identifying Magical Words in Communication and Journalism

My first research in the intersection between communication, journalism, and gender relations analyzed the first AIDS news published by Brazilian newspaper *Folha de S. Paulo*, when AIDS publicization was still in its beginnings, wrongly classified as an epidemic affecting "risk groups" (Carvalho, 2009). Although my master's thesis received another title, my initial thought was to name it "a faggots, whores and junkies' disease? AIDS understandings from risk groups to risk behaviors". Even without this title, the work preserved the perspective of addressing socially controversial and disruptive events, identifying prejudice against *faggots*, whores, and intravenous drug users as components of the analyzed news. In the early 1980s, there was an emphasis on accusations that pointed homosexual males (*faggots*) as HIV's main targets, which resulted in atrocious headlines like "gay plague", "pink cancer", and others, though I must disclaim that I did not find this kind of headline on *Folha de S. Paulo*.

In that work, I ended up not dwelling on specific concepts such as homophobia or gender relations, but when we look back at it in retrospect, we can identify traces of their presence, noticing a recrudescence of prejudice against homosexual males that came in the wake of AIDS. This recrudescence appeared in religious discourses that charged the syndrome as a punishment inflicted upon sinful homosexual people, in medical discourses that suggested that gay men's sexual promiscuity was responsible for spreading HIV infections, among many other displays of prejudice, where boundaries between religious, medical, scientific, cultural, and behavioral motivations were difficult to identify (Carvalho, 2009).

From a communication theory point of view, the analysis of journalistic narratives and studies on homosexuality and AIDS relations made me realize deep fractures and inconsistencies in the relational perspective, presented in the late 1990s as a theoretical contribution that could overcome the limits of understanding communication as manipulatory processes (França, 1999). This perspective was theoretically correct in indicating more complex processes that suggested interpersonal communication dynamics mediated by socio-technical apparatus in a contextual condition. However, two problems remained.

The first one consists in relegating power struggles and the inevitable asymmetries in all communication relations to a less favored position, assenting to a principle that assumes that the related symbolic interactions would lead to mutual agreement. Furthermore, this perspective does not explain potential disagreements or the impossibility of consensus in some communicational exchanges that are mediated or not by socio-technical apparatus. Gender relations show us that the relational aspect is not immune to fissures, fractures, and permanent negotiations defined by intense power struggles, helping us notice similar communicational processes and product dynamics. The relational perspective must consider thus the economic and sociocultural inequalities that guarantee that the individuals involved in communication dynamics do not share the same conditions to establish dialogue and symbolic interaction. More significantly, communicational processes do not always result in a consensus or a possibility of mutual agreement and may even result in irreconcilable disagreements or in situations where it is impossible to establish a dialogue that overcomes the differences at stake in those communicative exchanges.

The second problem concerning the relational paradigm in communication studies is the risk of becoming a formula with a static set of conceptual and methodological postulates that could be applied to everything. In fact, even though the relational perspective focused on embracing the principles I briefly mentioned above, it also proved to be poorly aware of a contextuality that represents one of its own essential bases for explaining communicational products and processes. As I dug deeper into the issues surrounding AIDS and HIV, including what the journalistic narratives I analyzed made visible or kept hidden, there was no doubt that there were failures resulting from adopting theoretical and methodological standards used by medicine and science for fighting other diseases. Like never before, epidemiology faced the urgency of finding ways that could consider with greater efficacy the numerous social, cultural, and economic variables that influence the infection dynamics, and that is just a single example of the challenges that caused the collapse of the certainties acquired from the simple application of research formulas. The unique conditions of the AIDS and HIV epidemic in Brazil (Daniel, 2018; Daniel & Parker, 2018) exposed certain limits in medical-scientific theories and methodologies, particularly in epidemiology, because of very specific sexual arrangements among Brazilian men and how transgender people were vulnerable, for example.

An inexact science by nature, communication is not suited for methodological formulas, which is even more perceptible when we approach it to epidemiology and other

medical sciences. However, the nature of science, which is formed from numerous interpretations, is not the sole element that questions allegedly universal heuristic applications. The relational perspective claims that it is essential to consider the contextuality of communicational processes, but it very often neglects the materialities implied in these dynamics. The result is a tendency to neglect, theoretically and methodologically, distinct technical, aesthetic, cultural, behavioral, political, and ideological aspects of journalistic narratives, talk shows, soap operas, radio news, films, documentaries, YouTube videos, WhatsApp messaging, and interactions on social media. In addition to every other communication product and process, which also raise some ethical issues that challenge us. Following this, several settings found in socio-technical apparatus enabling the creation and circulation of many products and processes are frequently relegated to a less favored position, even though their material, cultural, political, ideological, aesthetic, and ethical characteristics make them ultimately relevant.

When the time came to review journalism theory, the formulas collapsed just the same. One of the questions I made aimed to discover the reasons for AIDS's recurrency in news coverage, following numbers that only grew as the syndrome spread throughout the Brazilian territory. When I was studying events as a concept, I found Adriano Duarte Rodrigues' (1993) proposal to consider the rareness of the event one of the main values for newsworthiness. According to this mathematical perspective, the rarer the event, the more newsworthy it would be, while the contrary results in less newsworthiness, something that is the exact opposite of what I encountered in the first years of AIDS coverage in *Folha de S. Paulo*. This inversion shows the fallaciousness of the theoretical and methodological formulas so widely used in journalism studies and how they fail to produce careful critical analyses of the researched phenomena. What became evident is that complex social realities are not susceptible to mathematical principles and their statistical logics since multiple actors and actresses were disputing medical, cultural, behavioral, moral, ethical, and many other meanings that were emergent in that context, inspiring articles that took the syndrome's social implications as an inexhaustible range for journalistic narratives.

My expectations were also frustrated by how AIDS was reported by what is generally named science journalism, as I assumed that medicine and science would have more to say about the syndrome, especially considering that in the 1980s, everybody was still seeking better comprehension of the infection mechanisms, of the HIV's characteristics and other technical parameters. However, the research revealed that the predominance of news stories mostly focused on behavioral and political aspects. They unveiled fights for the right to have dignified and universal medical assistance, fights against the prejudice suffered by infected people, pejoratively called "aidetic" at the time, and strategies that tried to evade the hegemony of medicine discourse about AIDS, as it could lead to HIV-positive bodies being put under control without taking into consideration the autonomy of those diagnosed people. In this case, as well, gender relations prompted changes in the informative strategies for AIDS and HIV journalistic coverage. Once

again, journalism research that adopts theoretical and methodological principles that were supposed to be really well-established because of their reoccurrence and, therefore, supposedly capable of guaranteeing satisfactory results was questioned. Such is the case of repeatedly resorting to "journalistic genres", something that science journalism does, and to a myriad of taxonomies, each with its own theoretical and methodological principles and its own pretensions of universal legitimacy.

Some 10 years after this research about the initial AIDS coverage by *Folha de S. Paulo*, in my doctoral research, I studied news coverage of homophobia and its consequences with a corpus composed of narratives published by *Folha de S. Paulo* and *O Globo* (Carvalho, 2012). Among other conceptual aspects, I was interested in understanding how the journalism practiced by those newspapers dealt with a subject that, since the 2000s, had become controversial in traditional and mediatic public spaces. The reports of physical and symbolic violence motivated by homophobic hatred — and many ruthless murders of LGBTIQAP+ people every year — the demands for legal assurances for marriages involving people who share the same gender, the fight for criminalizing homophobia, and many other factors. By refusing the perspective of journalism as a "mirror of reality" (Wolf, 1985/1994), my interpretation of the narratives and their agents and characters allowed me to understand journalism as a social actor in intense disputes of meaning and power struggles with other social actors and actresses that were engaged in debates regarding homophobia and its consequences.

One of my conclusions was that, instead of simply reflecting society as if they were its mirror, *Folha de S. Paulo* and *O Globo* proved to be decisive, interested agents in the public discussions regarding homophobia, despite all journalism's typical contradictions. So, while both newspapers demanded the criminalization of homophobia in their pages, they also presented an inability to overcome stereotypical biases regarding the LGBTIQAP+ population in some news and articles, which presented marks of LGBTIQAP+phobic rancor. As a result, the newspapers portrayed transexual people predominantly through the lens of violence and prostitution, associated homosexual men with hedonistic lifestyles, and treated lesbians as women predisposed to alcohol abuse.

On the other hand, in the analyzed narratives, both newspapers often stood against social actors and actresses historically identified with LGBTIQAP+phobic positions, especially religious groups and conservative politicians (Carvalho, 2012). To some extent, *Folha de S. Paulo* and *O Globo*, despite the contradictions found in the research, sometimes assumed stances against the ones perpetrated by Brazil's conservatives about homophobia and LGBTIQAP+ people's rights. As in the research on the first news stories about AIDS and HIV, the research on how news coverage dealt with homophobia, developed in a gender relations framework, was successful in identifying heuristic limits in theories and methodologies that try to understand journalism based on ready-to-apply packages, ignoring nuances of the investigated realities.

The next research was developed as part of my postdoctoral training at the University of Minho, under the guidance of Moisés Lemos Martins, when I studied physical and

symbolic violence against women in gender relations, comparing Brazilian website Uol and Portuguese website *Público*. The results indicated limitations for two conceptual perspectives on journalism studies often repeated thoughtlessly. The first refers to newsworthiness (Wolf, 1985/1994), and the second to the assumption that journalism is a form of knowledge (Genro Filho, 1987; Meditsch, 1998). Although I identified different approaches in the journalistic narratives published by both sites when addressing violence against women, related to each country's cultural particularities, I could also identify critical issues shared by the two conceptual perspectives I mentioned above.

According to the newsworthiness perspective, news media adopt criteria for selecting what is newsworthy from parameters and values that tend to become universal. These include the importance of the people involved, the event's geographical proximity to the target audience, the degree of violence in certain events, and a list that can be extended to infinity, as one can see in many studies that approach this subject. Even if these works consider that there is a criteria variability that depends on the studied media, the conceptual and methodological principles remain unchanged: just applying them is sufficient for us to reach a list of news values that, despite the events in question, would resolve the research proposal, dedicating little thought to other implied dynamics encountered in strategies that define if an event is newsworthy or not.

When we look closely at journalistic narratives that reported physical and symbolic violence against women within gender relations, it is possible to understand that adopting the newsworthiness perspective would mean neglecting the very problem implied in these types of violence. In other words, limiting a news value to the "degree of violence" to the very own value that transforms one particular aggression against women into news means that the complex power struggles and disputes of meaning underlying gender motivations were not examined. What is left out is precisely what matters most, the news media's ability to present physical and symbolic crimes not as another generic data that counts deaths and violence but as an agent in the dynamics that transcend other acts of daily violence. Therefore, what physical and symbolic violence against women in gender relations unveils is the newsworthiness perspective heuristic impossibility to reach beyond the surface of certain media's alleged motivations for choosing an event as newsworthy or not. Moreover, gender relations, because of their vast presence in society, allow the perception of another heuristic frailty of newsworthiness: the premise that news values are fundamentally a result of journalism's internal dynamics; that they are dictated by journalism's numerous agents, who make decisions primarily considering internal arrangements, such as a professional culture; temporal constraints that affect the news-making process, among many other variables, which, in this perspective, are not influenced by disputes of meaning and power struggles involving social actors and actresses outside journalism domains.

Journalism as a form of knowledge premise presents greater theoretical sophistication than the infinite set of possible criteria for newsworthiness, but it did not remain unscathed when I researched crimes against women motivated by gender relations. Authors

such as Adelmo Genro Filho (1987) and Eduardo Meditsch (1998) defend that journalism is one of the modern ways of knowing reality. Not only because we become aware of events through multiple informative media, whether they are near or distant from us, but also because of our systemic exposure to news, for example, about economy and politics, that would allow us to progressively comprehend these topics, and even get to notice their contradictions and rifts. In synthesis, although it establishes a knowledge distinct from sociological or philosophical knowledge, journalism, especially in Genro Filho's (1987) proposal, possesses the potential to unveil social reality based on the reported events' singularities. The analysis of narratives published on Uol and *Público* revealed a much different reality, in which these singularities, with rare exceptions, were restricted to a few informational aspects about the crimes and did not mention gender motivations. Also, the narratives generally portrayed a partial description of the scenarios and established causal relations mostly in agreement with police discourse. In fact, police officers were recurrently the only people listened to in the narratives, often speaking "on behalf of" both victims and aggressors.

Instead of considering the possibility that journalism is a form of knowledge, it seems more prudent to me, based on journalistic narratives that imply gender relations, to think of journalism in the logic of precarious intelligibility. Far from allowing the knowledge of social reality as a whole or singular social phenomenon, journalism offers partial explicative frameworks. Even considering how often we are exposed to multiple informative media, those would hardly let us transform what journalism offers as a set of individual data into a satisfactory collection of events. That could provide more sophisticated comprehensions within the scope of both particular and universal knowledge, resorting once again to the categories proposed by Genro Filho (1987).

Namely, most of the narratives I encountered in my postdoctoral research did not allude to gender relations at all when addressing crimes against women, and even when they did, they were defined just as "crimes of passion" or domestic violence. When these narratives treat physical and symbolic violence against women as common crimes or regular murders, they risk suggesting or insinuating that the victims were to blame for the aggression they suffered. I identified a between-the-lines logic in which gender relations appear without a proper explanation of their dynamics, that is, suggesting that those women died or were victims of some other crime, in synthesis, because they were not being and behaving as women in the allegedly correct way, and that, in addition, points to journalism's own ways of exercising gender violence.

Concepts like femicide (Pasinato, 2011) are absent in both sites' narratives on murders of women, although it is important to note that the concept is little used in Portugal. The only exception was a news article published in Uol about the sanctioning of the Femicide Law by President Dilma Rousseff, but the text did not explain the concept in detail, something that could contribute to a better understanding of the importance of the law. I also found a few exceptions that referenced gender relations directly, but only in narratives that focused on strategies for fighting femicide, not in the articles that reported

each crime. Thus, I believe that the precarious intelligibility perspective leads to a better understanding of journalism limitations when approaching this kind of event, compared to the pretentious claim that it would constitute a form of knowledge.

3. Magical Words in Gender Relations Studies

Still working with Silvia Rivera Cusicanqui's (2018) reflections on magical words as a metaphor for criticizing the heuristic limits of concepts that we sometimes use intuitively, I extend my discomfort to encompass some recurrent concepts in gender relations studies. As I pointed out, if, at first, gender relations theories and methodologies were fruitful for better understanding the limits in some approaches towards communication and journalism, as my research advanced, it also revealed heuristic limitations concerning gender relations, a vital area to my analyses and my proposals of new approaches. So, I have been progressively identifying concepts that, even when correct, lose power when used as clichés and toolboxes in some sort of exhaustive repetition that does not favor the particularities found in gender relations.

In the research on the first news about AIDS and HIV published by *Folha de S. Paulo* (Carvalho, 2009), I did not reflect on the concept of homophobia. However, the perspective of the resurgence of historical prejudice against homosexual people, prostitutes, and intravenous drug users was not enough to address the complexities that can be overlooked when cultural, racist, behavioral, economic, and other aspects are also at stake. Referring to homosexual people and AIDS generically, for example, proved to be incapable of encompassing particularities of sexual exchanges between men in Brazil (Daniel, 2018; Daniel & Parker, 2018; Green, 2000; Parker, 2002; Perlongher, 1987). Gay men's promiscuity was used as a moralizing strategy to "explain" why these people were "preferred" by the virus, which also applies to the prostitutes. However, this same promiscuity was not even cogitated as a characteristic of the supposedly heterosexual men who resorted to the prostitutes' sexual services. On the other hand, although included in the flawed "risk groups" list, hemophiliacs were not counted among the HIV-positive people who deserved ethical or moral sanctions, indicating not only a prejudice selectivity but also a distinction between victims that were innocent because they needed the hemoderivative transfusions that were unfortunately contaminated by the virus and the promiscuous tormentors that spread evil. In these cases, sexuality could remain in brackets, appearing at the most as a suspicion that some hemophiliac did not assume their homosexuality.

When we bring homophobia as a concept, the limits around some theoretical propositions in gender relations seem to be more profound. Even if we choose as a reference the proposal that homophobia is the individual or social repulsion to homosexual or presumed homosexual people, as sustained by Daniel Borrillo (2001), or if we choose Didier Eribon's (1999/2008) perspective of the logics of insult against homosexual people, there are still large gaps to overcome. If we look at the suffix "phobia", there is a suggestion that will probably associate the term with "disease", even if we take it as

a metaphorical social construct. This suggestion can fallaciously lead us to an idea of a "cure", most importantly, erasing complex relations between religious, pedagogical, legal, philosophical, and medical discourses, among others, which have all historically sustained the hate practices identified with homophobia, even if, paradoxically, they can also contribute to denounce and overcome it (Carvalho, 2012; Junqueira, 2007). More seriously, the multiple physical and symbolic violations — that often result in cruel murders — can become obscured by the perspective of homophobia as a disease, or they can be justified and even lead to a judicial acquittal by the allegation that since it is a disease, the responsibility of those who committed homophobic hate crime can be mitigated (Carrara & Vianna, 2004).

The polysemy of the term "homophobia" poses a theoretical challenge when we observe the numerous ways prejudice, rejection, and downgrading hierarchies are directed against people included in the broad spectrum sustained by the acronym LGBTIQAP+. Beyond the commonest critique that homophobia is a concept initially applied only to homosexual males, from which derives the proposition of concepts that could encompass each specific prejudice, like lesbophobia, biphobia, transphobia, and, more recently, LGBTIQAP+phobia (Green et al., 2018), we have particular features that aggravate the intensity of hatred in sexuality rejection depending on which LGBTIQAP+ population is attacked. We must also consider intersectionality issues when evaluating different levels of violence that are generically attributed to homophobic motivations. Thus, non-negligible differences that make transexual people more vulnerable to violence than, for example, gays and lesbians, become more visible. So does the comprehension that racism is a component that strengthens rejection motivated by sexuality, also evoking vulnerabilities associated with income and economic power.

The demystification of the polysemy around the term homophobia leads to the recognition of downgrading hierarchies from inside the LGBTIQAP+ groups, showing prejudices that include racism, disdain for those who have lower economic status, and something that, in theory, should not occur: prejudice related to sexuality. Consequently, we find gays who demean other gays because they are black, poor, or live in places they consider inferior; those who reject the peers they consider effeminate. There are also lesbians denouncing the prejudice of gays against them, and vice-versa. Cross-dressers and transgender people as targets of gay, lesbian, and bisexual rejections. Some transgender people refuse to form any solidary bond with homosexuals because they want to identify with a particular gender from binary criteria and many other forms of violence among LGBTIQAP+. Rather than being polysemic, the concept of homophobia remains ambiguous, slippery, and even contradictory.

However, the different shades of prejudice and the impossibility of one single term to contemplate all the forms of physical and symbolic violence should not lead to dismissing the concept of homophobia, starting with the fact that it has a wide social circulation. Recognizing homophobia as a serious social problem is undeniably associated with the term itself, including the demands for criminalization, a decision that in Brazil has been historically postponed by the legislative power, who should be the one responsible for taking

the initiative forward. Nonetheless, the judiciary ultimately decided to put homophobia on par with racism as a serious crime. To the main objectives of this article, highlighting the misleading polysemy of homophobia as a concept must begin by recognizing it as a magical word that should be questioned if its inherent theoretical and methodological assumptions are pertinent. Therefore, dealing with repulsion against LGBTIQAP+ people requires evaluating the multiplicity of variables that must be considered to understand better hate and violence dynamics that happen both internally and externally to these populations. By doing so, we can prevent a generic usage of the term homophobia, which would lead us to the risk of neglecting intersectionalities, such as racism, economic issues, and many others that each particular research must be alert to detect.

The research on physical and symbolic violence against women in gender relations prompted me to identify more magical words whose seduction could be hiding heuristic weaknesses. Firstly, it was theoretically and methodologically important to establish procedures that would guide the corpus construction, and I already knew beforehand that direct references to gender relations would be scarce. In fact, the search for keywords "gender", "gender relations", "physical violence", and "symbolic violence", whether accompanied or not by the words "woman" or "women", led to identifying virtually no journalistic narratives in the websites. The alternative was to adopt, from a previous theoretical set, the method of reading, during the same period, all the news in UOL and *Público* to compose the corpus and to complement this methodology with a thorough review of the chosen theories to verify their relevance regarding the particulars of what was under analysis, including cultural, behavioral, social, economic, and legal differences between Brazil and Portugal.

A recurrent concept in feminist and homosexuality studies, compulsory heteronormativity (Butler, 2007, 1990/2008; Louro, 2004, 2007, 2009) was one of the magical words that challenged me in understanding the specific dynamics of physical and symbolic violence against women in a gender relations context from the corpus of my analyzed journalistic narratives. If we comprehend the concept, *roughly speaking*, as the imposition of emotional and sexual relationship models between people of different genders, preferably for procreation, where there is no doubt about the obligatory roles for men and women, we face the problem of reaching the results of the investigation before the journey even begins. In other words, the premises impose the conclusions, regardless of how the research is developed, and this will tend to submit the investigated reality to theoretical and methodological principles of alleged universal heuristic power.

The perspective of compulsory heteronormativity can help — a lot — in analyzing the motivations of physical and symbolic violence against women in a gender relations context, including identifying the journalistic media as part of these entanglements. However, it should be adopted as a possible starting point, making sure not to neglect the specificities underlying such dynamics, but not as a final destination. Besides the mentioned limits, we risk adopting manichean views with little attention to rifts and contradictions where complex conditions of intersectionality, referring to the ones we have been insisting on here, might be completely relegated to the sidelines, not to mention the reification of binary divisions.

Although not incorrect either, the idea of patriarchy, especially relevant in some recent feminist studies, posed some difficulties to the research on physical and symbolic violence against women in a gender relations context. The first question to emerge: would the concept present the same heuristic power to comprehend the researched dynamics of violence in journalistic narratives reporting on occurrences in Brazil and Portugal, each with its distinct cultural configurations? This first doubt raised another similar one: being the Portuguese society identified as the colonizer and the Brazilian society as the colonized one, should we have expected some kind of gender solidarity through the dynamics of patriarchy that could have made us different from Portugal in what concerns patriarchy? Or even: could Brazilian patriarchy be a direct inheritance from the Portuguese patriarchy? The challenges imposed by these questions and other doubts derived from them made me consider it more prudent to not deal with the concept of patriarchy, thus avoiding using a theory whose fractures were evident.

The most seductive magical word that I came across while researching journalistic narratives of the Brazilian and Portuguese sites was the notion of hegemonic masculinities, widely used in research on homophobia, violence against women, and other studies that have gender relations as their focus. Inspired by Gramsci's concept of hegemony, Raewyn Connell (1995) proposed this idea to understand the masculine domination strategies based on studies conducted in Australia that exposed how masculinities are constructed in school and union contexts, giving particular attention to body modulations and the attainment of privilege. The success of this theory led not only to its extensive use worldwide but also to several critiques, ranging from the potential impertinence in its correlation with the Gramscian concept of hegemony to risks such as reification of the concept and inadequacy in different contexts, besides the status of ready-made formula in its theoretical and methodological configurations.

The author has published a well-argued paper, co-written with James W. Messerschmidt (Connell & Messerschmidt, 2013), recognizing some limits of the hegemonic masculinities perspective and refuting some other criticisms. Still, I do not believe that the fundamental problem has been resolved. This perspective is still used to apply theoretical and methodological principles that ignore descriptions of each investigated reality's specificities and maintain theoretical and methodological assumptions leading to conclusions that preserve a taxonomy that is more efficient in naming variations than conceptual innovation. As a result, even though some studies recall the opposition of female researchers to hegemonic masculinities or incorporate notions such as subordinate or complicit masculinities, the taxonomic list is preserved, with potential analogies to the lists of newsworthiness criteria I criticized in the previous topic. In this sense, the researcher's creativity can lead to an infinite list of masculinities taxonomy, always showing internal cohesion, but carries a low potential to break from reified principles, no matter how sincere Connell's and Messerschmidt's arguments have been in affirming the opposite.

Prudence once again led me to not use the concept of hegemonic masculinities in the research on physical and symbolic violence against women in a gender relations

context, preventing me thus from resorting to a notion more because of its widespread use than by its heuristic power. As such, using concepts and methodologies with reservations about their problems and acknowledging their limits would amount to a double mistake. The first is turning to schemes that impose the results before the analytical path, as I indicated in other theorizations and methodological contributions in communication, journalism, and gender relations fields. The second is that recognizing the limits becomes a mere formality devoid of practical meaning because when one repeats what was supposed to be under criticism, the capitulation evidenced by the repetition eliminates the criticism's legitimacy or sincerity.

4. Conclusion

As I affirmed in the introduction, my objective in this paper is not to offer alternatives to the theoretical and methodological principles that have caused me discomfort from the perspective of magical words, a concept borrowed from Silvia Rivera Cusicanqui (2018). In each new research, my efforts — not always successful, I should emphasize — have been directed to the search for analytical perspectives that escape easy schemes, with a vigilant eye on the particularities of each research. In this sense, theoretical and methodological contributions in gender relations studies have been crucial for my proposals for new approaches to how we understand communication and journalism. However, the inverse path has yet to be walked.

Nevertheless, I believe some reflections I have been developing in the last 2 decades of research can at least suggest some leads to follow. The fallacy of applying falsifiability principles in gender relations, communication, and journalism studies should be avoided, just as some sciences do in their processes of scientific verification. For this reason, I have always been careful to indicate heuristic limits and the ready-made character of some theoretical and methodological formulas and not simply disqualify them as unscientific. They are limited, and we must overcome their limitations by recognizing that claiming a universality for our assumptions is impertinent because it ignores the specific conditions of what we are researching.

The temptation to transform the repetition of theoretical and conceptual models into proof of scientific validity, or at least capable of constituting universally accepted analytical procedures, is another risk to be avoided. It is always important to remember that, in the universe of communication, journalism and gender relations studies, we are dealing with the imprecision, with human processes at their highest levels of disputes of meaning and intense power struggles. They are susceptible to change, and they can even be changed by research results that inspire and are inspired by political actions aimed at overcoming the problems indicated here as connected to gender relations and the struggles that take communication and journalism fields as being strategic for fighting those problems, with no Manichaeism or reductionism of any kind. It is very important

to highlight that the media has been a recurrent promoter of gender violence, for example, when it reaffirms LGBTIQAP+ people stereotypes in informative and entertainment products and processes, in sensationalist news coverage of physical and symbolic violence against women and LGBTIQAP+ people, among many others.

In my opinion, there is an urgent need for adopting a more collectivized rewriting of gender relations texts, one that effectively incorporates the multiplicity of people concerned and their own ways of comprehending the challenges they face every single day. That means, for example, effectively granting transgender people that their locus of speech is accompanied by locus of power the same way feminists, lesbians, and gays have been gradually achieving, even with all the setbacks. Academic research is not immune from repeating stereotypes and prejudices, and this, at least in part, is a consequence of the problems that I tried to expose in this work.

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Media Debates on Agrarian Reform in Contexts of Institutional Breakdown: 1932–1936 in Spain and 1964 in Brazil

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Abstract

This article aims to develop a comparative analysis of press discourses concerning the agrarian reform issue in two critical events that marked the 20th century: the failed attempt of a coup d'état that triggered the Spanish Civil War in 1936 and the 1964 civil-military coup in Brazil. The study objects are journalistic texts published by the monarchic periodical *ABC* in Spain and the Brazilian newspaper *O Estado de S. Paulo* on the agrarian reform. That was a central proposal of the reformist governments in question and, consequently, a critical media discursive axis. Within a methodological proposal for articulating the fields of communications and history, we attempt to demonstrate the interconnected plates that help understand the two events: the political environment of antagonistic pluralism, historical consciousness, the coordinated discourse of the mainstream media, and finally, the conception of change as a media event boosted by an ideology of public transparency in this type of discourse.

Keywords

press, agrarian reform, Brazil, Spain, 20th century

Debates Midiáticos Sobre Reforma Agrária em Contextos de Ruptura Institucional: 1932–1936 na Espanha e 1964 no Brasil

Resumo

O objetivo deste artigo é realizar uma análise comparada de discursos da imprensa em relação ao tema da reforma agrária em dois importantes eventos que marcaram o século XX: a tentativa fracassada de golpe de Estado que deu início à Guerra Civil Espanhola no ano 1936 e o golpe civil-militar de 1964 no Brasil. Nossos objetos de estudo são textos jornalísticos publicados pelo periódico monárquico *ABC* na Espanha e pelo brasileiro *O Estado de S. Paulo* sobre o tema da reforma agrária, proposta central dos governos reformistas em questão e, consequentemente, importante eixo discursivo midiático. Como resultado, procuramos demonstrar, em uma proposta metodológica de articulação dos campos da comunicação e da história, placas de encadeamento que ajudam a compreender os eventos em questão, como o ambiente político de pluralismo antagônico, a consciência histórica, o discurso coordenado da grande imprensa e, finalmente, a concepção da mudança como um acontecimento midiático, impulsionado por uma ideologia da transparência pública desse tipo de discurso.

Palavras-chave
imprensa, reforma agrária, Brasil, Espanha, século XX

1. Introduction[1]

This article aims to undertake a comparative analysis of the Brazilian and Spanish most representative newspapers' performance in two critical events that marked the 20th century: (a) the failed coup attempt that triggered the Spanish Civil War (1936–1939), allowing the establishment of the most extended fascist regime in Europe, and (b) the civil-military coup in April 1964 in Brazil, the inaugural act of a dictatorship that lasted 21 years (1964–1985). Despite the geographic distance and nearly 3 decades between these occurrences, they hold different aspects in common: among the most important, the decisive participation of the mass media in the process of delegitimizing the democratic institutions of both countries and their determined commitment to authoritarian solutions (Barreiro, 2004; Chammas, 2012; Larangeira, 2014; Luis Martin, 1987; Silva, 2014).

In Spain, the frustrated coup d'état confronted two opposite world views since the new regime proclamation in 1931: central and progressive leftist ideologies supporting the democratic government and conservative fascist positions supporting the insurgent military. Since April 1931, the subsequent war episode revealed a symbolic and ideological conflict, during which strategies, techniques, and communication technologies were developed and tested for political propaganda purposes (Pena-Rodríguez, 2014). The event helps understand — for its media, political and ideological aspects — other events that marked the 20th century, including dictatorships spread across Latin America between the 1960s and 1970s.

The civil-military coup that established Brazil's dictatorship (1964–1985) can also be called a media coup (Silva, 2014). The media have actively contributed to the atmosphere of political instability and legitimization of unconstitutional acts that led to President João Goulart's ouster. Similarly, in the Second Spanish Republic, we observe the media framing the events as a "historical crossroads". According to the Brazilian press, the country was harassed by the communist threat, with no alternative but the intervention of forces in defense of legality and democracy (Silva, 2014).

This article is structured into two main sections. Firstly, the discussion about the comparative method and how to advance research by approaching the media from a historical perspective, bringing communication and history together. Secondly, empirically applying the method to study the proposed discourses, first, examining the bibliography about the press performance in the Second Spanish Republic and the 1964 coup in Brazil. Next, we comparatively analyze the Spanish texts published by the monarchic newspaper *ABC* (http://hemeroteca.abc.es/nav/Navigate.exe/hemeroteca) and the Brazilian newspaper *O Estado de S. Paulo* (OESP; http://acervo.estadao.com.br/) on agrarian reform, the core proposal of both reformist governments and a crucial discursive axis.

[1] An expanded version of this article was presented at the "8th Congress of the Consejo Europeo de Investigaciones Sociales en América Latina", organized by the Instituto de Iberoamérica at the University of Salamanca between June 28 and July 1, 2016.

Finally, we conclude with a self-reflection on the comparative experience and its results, aiming to contribute to the encouragement of new experiences dedicated to "comparing the incomparable" (Detienne, 2002/2004).

2. The Comparative Method and Its Relevance to Media Studies From a Historical Perspective

We worked with a comparative theoretical-methodological approach. Thus, the two events (Veyne, 1971/2008) are understood as specific and, at the same time, as reflections of broader contextualizations, accessible by comparison: "certain elements of comparative abstraction allow us to understand the complexity of particularities. Mainly, it prevents the historian from viewing *a priori* specificity as exceptionality, originality, uniqueness" (Lima, 2007, p. 28).

In *Comparar o Incomparável* (Comparing the Incomparable), French historian Marcel Detienne (2002/2004) advocates the use of the comparative method in the history field, based on the critique of unrestricted adherence from some of its studies to the construct of its place as "science" and "national". He proposes a closeness to the anthropology field, which, in its turn, does not respect predetermined boundaries in the comparative exercise.

The author identifies the Renaissance historians — like explorers of the so-called "new world" — as those that paved the way for an approach to the "criticism of traditions and all that is handed down to us" (Detienne, 2002/2004, p. 21). In search of "historical perfection", historians such as La Popelinière (1541–1608) proposed on-site exploration of places and humanities that inhabited there, an ethnographic disposition, and a "wish to experiment on both oneself and others, whether far away or closer to hand, and whether alive or dead" (Detienne, 2002/2004, p. 22). The first ethnological experiences appeared at the beginning of the 18th century. The studies were framed into an evolutionary perspective; cultures range from the most primitive to the most evolved, and the Hellenic world is banned from the comparative exercise.

French historian Marc Bloch (1886–1944) provided new insights into the comparative studies based on the working method of philologists and anthropologists. He highlighted the importance of the comparative method as a required way to develop the historiographical synthesis. Supporter of a working method that mixed division of labor and teamwork, Bloch has had a decisive influence on the current compared history, especially after the rise of historical sociology and cultural studies.

Detienne (2002/2004) shows a critical point of view concerning the comparative movements of the 20th-century historians in France, England, and Germany— including Marc Bloch — considering that these approaches are still restricted to the national character and "between neighbouring contemporary societies of a similar nature" (p. 35) — European nature, it is important to note. Commenting on the English case, Detienne (2002/2004) provokes: "no non-European country was a suitable subject when it came to thinking about what it meant to found a colony, establish a territory, or introduce ways of living together in a new space" (p. 35).

For the author, "building comparables" is an eminently collective activity based on the notion of singular-plural, favoring the work of cooperation between historians and anthropologists and breaking with preconceived limits of time and space:

> the main thing, when it comes to working together, is to shake free from what is close at hand, what one is born to or native to, and recognize as soon as possible that we need to learn about all human societies, every community possible or imaginable, for as far as the eye can see, with historians and anthropologists all intermingling. Forget the lavish advice of those who for half a century have been repeating endlessly that the best thing to do is to set up comparisons between neighbouring societies, bordering one another, that have progressed, hand in hand, in the same direction, or between human groups that have reached the same level of civilization and at a first glance present enough similarities for one to proceed safely. (Detienne, 2002/2004, p. 46)

To motivate the work of comparison, Detienne (2002/2004) suggests the search for "generic enough" categories (p. 49), avoiding those very specific to a culture. For example, to answer the question "what is a place?" his research group resorted to the categories "found, foundation, founder". They served to understand the object of study as a mechanism of thought, allowing researchers to recompose it, disassemble it, articulate it, and refine it under different configurations, conditioned by the comparative exercise.

Detienne (2002/2004) calls "comparable" the entries chosen by those who dedicate themselves to investigating and undertaking the comparative exercise. These entries should not serve the production of themes, typologies, or morphologies but rather work as "interconnected plates" that put the configurations of society into perspective. "When a society (...) adopts a particular element of thought, it makes a particular choice that might have been different" (Detienne, 2002/2004, p. 58). In short, the comparison of comparables advocated by the author is concerned with detecting and analyzing mechanisms of thought (Detienne, 2002/2004, p. 65).

In comparison, there is also an ethical value that leads the researcher to critically examine his/her tradition and values, seeking to identify and interrogate his/her assumption. It means admitting that all societies are historical. It is possible, primarily through comparison, to build categories to understand what Detienne (2002/2004) calls "historical consciousness", which manifests itself mainly through three notions: memory, change, and past.

Thus, memory is not enshrined in the realm of information storing but rather in the complex construction of human time: "a temporal apprehension of the distance between the self at one moment and the self at another" (Detienne, 2002/2004, p. 74). The researcher is interested in paying attention to the human ways of projecting this distance within different architectures of time, remembering that what we conceive as historical consciousness begins with the organization of this "present absence" (Detienne, 2002/2004, p. 76) and that this movement is not spontaneous.

The change's role in the constitution of historical consciousness is linked to the composition of critical spaces in shared experiences of change, even though "there appear to have been many societies that have been through radical upsets and changes without recognizing them or thinking and theorizing about them" (Detienne, 2002/2004, p. 77). In western societies, based on writing techniques and historical knowledge, which believes that its object is the past itself, the change is understood in a concept of linear and irreversible time, manifested in unpredictable and singular events.

Finally, the representation modes of the past are also manifestations of the historical consciousness. From the past "what has been" — radically separated from the present — to the past that teaches, authorizes, and is also opened to the future. There are different ways of approaching tradition and ancestry. It is the latter direction that points to the definition of history proposed by Huizinga (1936): "it is the intellectual form in which a civilization is accountable to itself of its past" (p. 9).

Paul Veyne (1971/2008) argues that neither universal nor singular, specific events can be considered historical events. Their specificities appear as they are inserted into the fabric of history through the organization of a plot:

> what is not universal and what is not singular is historical. For it not to be universal, there must be a difference; for it not to be singular, it must be specific, it must be understood, for that sends us back to the plot. (Veyne, 1971/2008, p. 72)

When organized according to noticeability criteria — topicality and exceptionality — journalistic discourses can be taken as potential organizers of the plots that will account for the events, pre-selecting the plots that may interest history.

Using these reflections in the journalistic field, we propose a definition of journalism from the perspective of its insertion in the historical consciousness: it is a space for criticism, characteristic of modernity, in which society accounts for its present through specific professional techniques and its narrative conception of the notion of event, submitted, in turn, to capitalist market logic and, consequently, to ideological biases analogous to their conditions of production, circulation, and reception.

According to this article's conception, in modern societies, the press acts in a particular way to manifest what the change is — and, consequently, the events. The extraordinary expansion of the media in the last century inserted western civilization into an unprecedented space for the critique of change. Studying the different manifestations of social communication phenomena is essential for understanding the historical consciousness manifested in the cases we present.

For Sodré (2009), the press, as the bourgeoisie's preferred means of communication, has its modernity "viscerally linked to the same historical demands that preside over the phenomenon of world construction through enlightened discourse" (p. 11). Its legitimacy is founded on the principle of the superiority of discursive reason, nurturing what the author calls an "ideology of public transparency" (Sodré, 2009, p. 11). The modern press establishes itself within liberal ethics as a spokesperson for civil rights and a

fundamental stronghold of freedom of expression. Sodré (2009, pp. 13–14) portrays the ideological form assumed by the industrial press: universally bourgeois and European; technically improved by Americans; with a British contribution to the news composition as a narrative of the event rationalized as a commodity. Thus, notwithstanding the particularities of each field, Sodré's critique of the insertion of the press in modern societies follows the same perspective as Detienne's (2002/2004) when he points out the emergence of history as the "national science" that studies the past in itself.

One cannot forget that the press, however, is based on a paradox since it does not fail to use mythological resources, such as the "construction of a narrative about itself as a mythical entity that manages the truth of social facts, and the enchanting rhetoric in the fragmentary narrative of the present" (Sodré, 2009, p. 12). The liberalism mythology covers up the disputes around the attribution of meanings that preside over the constitution of journalistic discourse while at the same time granting the news the status of neutral clarification.

It is mainly from the 20th century that change — or the mediatic reading of this notion — has emerged as a predominant value in western historical consciousness through the action of the mass media. As Detienne (2002/2004) calls it, this is the first "interconnected plate" we used to start the comparative proposal of this article.

The military coup, whose failure led to the Spanish Civil War, came wrapped up in what we call the "placenta of the coup", a set of activities for delegitimizing republican politics and institutions. The conservative press played a crucial role as an organ of anti-republican mobilization and spokesperson for conspiratorial plans against the legitimate democratic government. The destabilization of public opinion for coup purposes has improved over time and occurred in different parts of the world, including Brazil in 1964, where was evident the existence of this conspiratorial placenta that generated the appropriate environment for the coup. After this first notion, which is further developed in the next topic, we analyze the agrarian reform issue in two major newspapers: *ABC* in Spain, and OESP, in Brazil. This article is committed to the task of breaking away from predetermined geographical and temporal boundaries in performing the comparative exercise. It starts from the singular-plural dialogue between researchers from different fields of work, countries, and experiences.

3. Press and Media Coups in Spain and Brazil

The press played a vital role in Spanish society in the 1930s. The arrival of the new regime represented a significant stimulus for the newspapers within the framework of a social and democratic state of law, "the first authentically democratic regime" in the history of Spain (González Calleja et al., 2015, p. 18). The country's overall modernization and the democratization of the power in all its aspects made the press reflect a model of government that, for the first time, gave the leading role to the most innovative sectors that demanded significant changes for the country. On the republican stage, we witnessed a golden moment of journalistic freedom despite news censorship and newspaper

suspensions due to the Ley de Defensa de la República (law for the defense of the republic) and the Ley de Orden Público (law of public order). Within the framework of democratic states at the time, those laws were not exceptional. Notwithstanding, their detractors highlighted the facts to invoke the republic as "the great frustrated opportunity of freedom of the press in Spain" (Sinova, 2006). It was a stage of unprecedented political mobilization of social and cultural modernization. Some of the greatest authors in the history of Spanish journalism wrote chronicles in the pages of different periodicals of the moment.

Since its beginning, different Spanish right-wing formations have accused the republican regime of illegitimacy. Some essential changes were described as communist in a political framework that at no point disrupted the surrounding sociopolitical reality. In the process of increasing radicalization, which would lead the Spanish right to support the intervention of the Army, and due to positions close to fascism, the conservative press very early joined the offensive against the republican state. Newspapers such as the monarchist *ABC*, *La Época*, and *La Nación*, the traditionalist daily *El Siglo Futuro*, and in a disguised way, the Catholics *El Debate*, *Ya,* and *Informaciones* fueled the offensive to delegitimize the republic, creating the ideal ambiance for the coup. Later, Francoism would use it to justify its extermination plan against a significant sector of the Spanish population and its Catholic-Fascist state model[2].

The most active daily newspaper in this anti-republican campaign was the monarchist *ABC*. Founded in Madrid in 1903 by journalist and businessman Torcuato Luca de Tena y Álvarez Ossorio, the daily *ABC* — which since 1929 had a new edition published in Seville — was the organ of the Alfonsine monarchist right-wing. From the beginning, it resolutely bet on a total rupture with the new regime (Barreiro, 2004). With strong ties to the landowning aristocracy and a supporter of an authoritarian monarchy, the daily *ABC* was a significant laboratory of authoritarian ideas (Morodo, 1985). It followed the Italian fascist model experienced in Spain during the 1920s under other right-wing publications, such as the magazine *Acción Española*. These authoritarian ideas were fundamentally based on the defense of the social order inherited from the monarchy, the apology of an antiliberal nationalism, exaltation of and nostalgia for Spain's imperial past. Its pages were converted without reference to the conservative Spanish press and were the seedbed for nurturing concepts and militants in the various right-wing formations in those crucial years. Moreover, many of its collaborators constituted the nucleus of the Spanish press during Francoism, distinguished by their passionate defense of the dictatorship (Luis Martin, 1987).

Five were the issues used by the monarchist daily *ABC* in its anti-republican campaign. First of all, the religious issue. The conservative newspaper considered the idea of building a secular State as a frontal attack on Spanish Catholics by a republic that was fiercely anticlerical and contrary to the national essence. The outcome was to engrave in the collective memory of many Catholics the concept that religion and republic were conflicting terms, helping to deprive the new regime of fundamental support for its survival.

[2] On this particular matter, see Checa Godoy (1989) and, especially, Barreiro (2004).

Secondly, the military issue. The military reforms developed by the new government, which sought to rationalize the personnel by eliminating the existing high number of officers, were qualified as a vendetta against the honor of the army. A fact that undoubtedly contributed to heat the spirits of the military personnel and explains the newspaper's support for the coup attempt staged by General Sanjurjo in August 1932.

Thirdly, the autonomic issue. The daily *ABC* treated the Catalan subject as "treason", manifesting it by rejecting the draft Statute of Autonomy for Catalonia and later refusing to accept self-government in the region. The consequences were to revive the ghost of separatism and contribute to creating an excluding nationalism, Castilian-like, that would make impossible any rational way out of the country's multinational labyrinth.

Fourthly, the social issue. The social legislation of the first republican biennium, mainly the agrarian reform program, would become *ABC*'s major hobbyhorse. Its purpose was to consolidate the social bloc of large landowners, adding the small and medium-sized anti-reform peasants while deteriorating the image of the new regime, described as collectivist and socialist.

And lastly, the issue of public order. The conservative daily used the several disorders led by the anarchist movement to show the image of a weak regime with apparent sympathy for the insurgents, unable to maintain law and order and guarantee property rights. Later, the newspaper used the insurrectionary attempt led by the Asturian left in October 1934 to manifest the revolutionary intent of the same regime. A fact that would worsen after the triumph of the Popular Front in the February 1936 elections, when the conservative press bluntly spoke of the communist danger looming over Spain and the need to prevent it, including force as required.

If there was a moment when *ABC* reflected all the tensions, it was the one motivated by the parliamentary sessions of June 16 and July 1, 1936, centered precisely on the deterioration of public order. The newspaper expressed its contempt for the government through its collaborator, Manuel Delgado Barreto, even accusing it of being directly involved in several events. In the following days, the diary alluded to an intervention by the leader of the monarchic right, José Calvo Sotelo, who stated that the social and political situation could not sustain itself any longer and warned of the possibility of a preventive coup d'état. Faced with the government's inertia, accused of precipitating the country into rebellion and anarchy, Calvo Sotelo demanded order and did not hesitate to declare himself a supporter of a fascist state that would end the class struggle driven by Marxism.

Thus, we can observe how a significant sector of the Spanish press at the time considered the democratic change of 1931 as a pathology, a demagogic sequel of the parliamentary system that General Primo de Rivera tried to resolve with authoritarian methods back in the 1920s. First, it proceeded to identify the republic, revolution, and democracy indistinctly in its pages and then to carry out a fierce denunciation of the iniquities of the republican regime. The revealing of the radical nature of the reformist republican program inevitably led to questioning its democratic nature and its adequacy to the national reality converted into a symbol of all the evils produced by the anti-Spain.

A fruitful discourse that later became the cornerstone of Francoism's social imaginary and whose impressions persist until today.

Later 30 years, echoes of this discourse crossed borders. In the context of the confrontation of the so-called "Cold War", the propaganda experiences developed by fascist states were used by the victorious democratic powers of World War II and, singularly, by the United States.

In its way, in the 1960s, Brazil experienced some significant global issues: the tensions of the Cold War between the United States and the Union of Soviet Socialist Republics and the effervescence of counterculture movements. For Gaspari (2002), the Brazilian right-wing adopted a conservative and anti-communist dirigisme, manifesting itself as a planning and centralizing utopia that looked down on the popular vote. The belief in the communist threat was at the basis of that utopia, for propaganda purposes, as cement to unite diverging interests, and as a stereotype to cover up simply libertarian or reformist banners. This conservative movement found support in the "red enemy" hunting undertaken by the United States — especially, in Brazil, in the figure of ambassador Lincoln Gordon (Green & Jones, 2009) — and, in Spain, embraced by fascism that was spreading in Europe. In Brazil, the Doctrine of National Security dominated the Escola Superior de Guerra (war college). It was a set of geopolitical guidelines that, among the foremost national objectives, established the protection of Brazil against the internationalization of communism through reciprocal commitments between Brazil and the United States of America for the hemisphere defense (Couto & Silva, 1981).

João Goulart, known as "Jango", reached the presidency with the resignation of Jânio Quadros in August 1961. In the 1960 elections, he was elected vice-president by the Brazilian Labor Party. Quadros (National Labor Party) was elected president with the support of the conservative National Democratic Union, with the highest number of votes a candidate had ever received in the country: 48% of the votes (Costa, n.d.).

Quadros' government begins with difficulties. Without a majority in congress, it faces problems. He wanted to become a third world leader through a foreign policy independent of the United States. Brazil's refusal to support the expulsion of Cuba from the Organization of American States and the commendation of Cuban Minister Ernesto "Che" Guevara with the Order of the Southern Cross were some examples of his policy. The excentric Quadros had an ambiguous government, and the real motivation for his resignation is not yet transparent. History and social sciences literature agree that he intended to stage a coup d'état (Ferreira & Gomes, 2014). Quadros resigned just when Jango was on an official visit to communist China. Contrary to his plans, the resignation was accepted. Then, a military junta was formed to prevent Jango from taking office, accusing him of closeness to the communists. Congress formed a broad alliance in defense of the constitution in confrontation with the military. In the country's south, Governor Leonel Brizola headed the Legality Campaign. The vice-president took office but under a parliamentary regime.

Jango ruled in a hostile environment but kept trying to advance the labor program, the administrative and university reforms, control of foreign capital, and state monopoly of strategic sectors of the Brazilian economy.

The anti-communist right-wing had to articulate with organizations such as the Brazilian Institute of Democratic Action and the Institute of Research and Social Studies and coordinate the interests of large American corporations, national private groups, and ruralists, financing the election campaign of opposition parliamentarians in 1962 (Ferreira & Gomes, 2014). In a plebiscite held in January 1963, the population opted for a return to the presidential system.

On March 13, 1964, the Rally of the Reforms gathered around 150,000 and 200,000 people in Rio de Janeiro. On the platform, Jango defended the sergeants' eligibility, illiterates voting rights, and, mainly, the agrarian reform. The opposition reaction came on March 19. The "March of the Family With God for Freedom" in São Paulo gathered around 500,000 people — businessmen, military, priests, and Catholic women — and warned of the "danger of communism in Brazil". On March 25, Brazil's Association of Sailors and Marines ignored the ordinance from the minister of the navy and held a meeting. The military hierarchy was at stake. Jango did not punish the insurgents as the officers had demanded.

The last straw was Jango's speech at the Automóvel Club in Rio de Janeiro on March 30, 1964, when the sergeants honored him. General Mourão Filho set out on the march from Minas Gerais to depose the president. The United States unleashed Operation Brother Sam in support of the coup plotters, deploying the military force of the Caribbean fleet on the Brazilian coast (Kornbluth, 2004). In the early hours of April 2, Senate President Auro de Moura Andrade declared the presidency vacant, despite the president being on the national ground, an act with no legal endorsement (Skidmore, 1989/2000). Goulart went into exile in Uruguay. The United States immediately recognized the new government. The military would only be leaving power 21 years later.

The media actively participated in the coup. The mainstream media, which was already promoting an intense campaign to destabilize Goulart's government, contributed to making the action legitimate. As widely known, Brazilian press history recognizes the mainstream media support of the military-civil movement of 1964. Nevertheless, part of the relationship between the mainstream press and the military regime lies in a nebulous area. The emphasis on and generalization of censorship — which undoubtedly sacrificed companies, professionals, and the people, as evidenced by consistent academic research and personal accounts — has contributed to forming a mythical discourse fomented by the press and journalists. They present themselves as unequivocal defenders of freedom and legality and, therefore, victims of the coup and the civil-military regime (Barbosa, 2007). This subject has been identified, researched, analyzed, and publicized; a movement of which the works of Abreu (2004), Amado (2008), Chammas (2012), Kushnir (2004), Silva (2013, 2014), Larangeira (2014), among others, are exemplary. This article attempts to contribute to this dis(un)covering (Silva, 2010) through a comparative methodological proposal.

4. Discourses of the Great Press on Agrarian Reform in Spain (1932–1936) and in Brazil (1964)

In the early 1930s, Spain remained a primarily rural country; almost 50% of its active population worked in activities related to agriculture and fishing. Far from being backward agriculture unfit for the slightest modernization process according to the regenerationism concept, during the first decades of the 20th century, the sector experienced significant development. It became wealthy export-oriented agriculture fundamentally based on olive oil production, wine, vegetables, and fruit. The new configuration coexisted with the extensive agriculture on large landed estates, mainly in the southeastern provinces, with very low productivity and high structural unemployment rates.

Upon the arrival of the republican regime, the opening process was seriously affected by the plummeting agricultural prices due to the international economic crisis that began in the United States in 1929. The reduction in corporate benefits, falling wages, and rising agrarian unemployment caused an increase in strikes and unions' demands. Simultaneously, the new government was trying to apply advanced socio-labor-oriented legislation to satisfy the interests of *boias-frias* (follow-the-crop migrants) and other farmworkers.

One of the pillars of this program was a profound reform of land ownership aimed at ending the unfair distribution that had been consolidated in the long process of capitalism's settlement in Spain. As Robledo (2015) points out, its goal was to transform the reality of the Spanish primary sector, especially in the latifundium zones, to act as an anticyclical factor of unemployment and consolidate the political commitment of the peasantry to the new regime.

The debate over land reform between 1931 and 1932 revealed the tensions within the republican coalition government on this issue. The socialists of the Partido Socialista Obrero Español (Spanish Socialist Workers' Party), part of the coalition government, advocated an expropriation model that would put the land in the hands of the union-organized laborers, thus indicating their preference for collective cultivation and modern, efficient, and mechanized farming. In contrast, the other parties in the government considered this proposal rather radical. Finally, in the debate that preceded the approval of the agrarian reform in September 1932, the socialists moderated their stances, opting for a compromise solution with the rest of the republican forces, supporting the proposal of the minister of agriculture, Marcelino Domingo. A pragmatic and ambivalent program encompassing the sharing of the latifundia into small lots and the collective management of peasant settlements (Malefakis, 1971).

Despite these moderate proposals, the right, in its different strands — from the catholic-agrarian to the monarchic-authoritarian — radically opposed any reform program. In the view of the monarchists — that had never accepted the results of the plebiscite elections of April 14, 1931 — the Second Republic was an illegitimate regime, and any bill coming from the new authorities should be called illegal. In this line, the great conservative press, led by the monarchist daily *ABC*, made agrarian reform its hobby-horse against the republican regime. In its view, the republican government only pursued

the dissolution of traditional values, starting with private property enshrined by the right. It did not prevent the press, at specific moments, from adopting an opportunistic and apparently conciliatory stance within the accidentalist politics sponsored by the Catholic-Agrarian right in terms of the political conjuncture and the balance of power between the different conservative families.

During this first stage, *ABC* struggled to describe agrarian reform as the spearhead of the collectivizing project pushed by the republic and, mainly, the reformist cabinet headed by Prime Minister Manuel Azaña, whom it did not hesitate to criminalize, accusing him of being responsible for the violent wave of the anarchist movement in the countryside, contrary to the reformist project. The newspaper's strategy had multiple objectives: on the one hand, to discredit the republican government in the eyes of the small and middle peasantry, accusing its policies of being the cause of the recurrent episodes of agrarian violence that took place during the first republican biennium; and, on the other hand, to demand an iron fist policy against the excesses of the unions, and the return to the traditional order in the countryside, with the annulment of all the policies promoted by the republican authorities. In its Seville edition, *ABC* showed its sympathy for the attempted coup d'état of General Sanjurjo in August 1932, who used the agrarian reform, and the military reforms, as a pretext for his plan to restore the monarchy. It was to occur within the conspiratorial action that the Alfonsino right had sustained nearly since the collapse of the monarchy and would have resulted in a new closure by the republican authorities. Later, the newspaper would enthusiastically join the project of rebuilding the traditional agrarian order promoted by the right-wing government between 1933 and 1935.

In June 1932, *ABC* covered the parliamentary debate on the agrarian reform program. On June 29 and 30, after several articles highly criticizing the minister of agriculture, *ABC* (*ABC* of Madrid) addressed the debate on a seemingly conciliatory note. It chose a particular schematic structure: reproduction of the parliamentarians' speeches, with few comments that attempted to emphasize a rectification posture on the part of the government after Minister Marcelino Domingo had opted for a more restricted and ambivalent project. It also used ideological expressions in an allegedly neutral note. The elected syntax intended to reinforce the assumption that the republican government had finally opted for common sense, limiting the reform's most progressive effects. The newspaper intentionally chose moderation at a moment when the power game between several right-wing formations seemed to lean toward the accidental and opportunistic path of the Catholic-Agrarian bloc, given the weakness of the conservative-authoritarian Alfonsino parties at the time.

The second stage began in February 1936, after the triumph of the Popular Front and the return of the left and Prime Minister Azaña to power. By this time, the republicans already had a better understanding of how to implement the agrarian reform and its effects. Then, the goal was to try a peasant way, that is, to make Spain a country of small farms through the redistribution of large estates in the first phase, providing it with an institutional framework. It would increase productivity in the countryside, transfer

the agrarian population to the secondary and tertiary sectors, and create a base of small landowners committed to republican values, following the French model.

At this point, the objectives of the republican parties clashed with the right-wing, which began the conspiratorial process that ended in the frustrated coup d'état of July 1936. In this context, *ABC* — and the rest of the right-wing press — played an essential role in creating what we call the "placenta of the coup", that is, the ambiance for delegitimizing democratic institutions in which the conspiracy develops and the arguments are created. Later, these arguments would serve as the basis for legitimizing the coup. In those decisive months, both the forms and the lexicon of the conservative daily showed it. To agitate the landowning classes, mainly in the south and east of the country — where some of the worst massacres perpetrated by the Francoists would take place — they resorted to fear, and mobilized the landowners against the danger of a communist revolution and paved the way for a future coup d'état. A resource magnified in the context of a polarizing campaign that aimed to create a climate in favor of military intervention and prepare consciences for the subsequent bloody repression (Espinosa Maestre, 2007).

The examples, in this case, are numerous and related to the fact that the Popular Front government was determined to resume agrarian reform and farm occupations together with farmworkers and unions. We highlight one significant *ABC* issue. On March 28, 1936, the daily reports on the personnel increase of the Agrarian Reform Institute, the agency in charge of the reform. Suddenly, the note of the news and the page layout changed to inform that an assembly of mayors in the province of Seville had agreed to request the government the reestablishment of the Ley de Términos Municipales (law of municipal terms). The Azaña government had adopted that measure in its first months in 1931 to remedy the forced unemployment of many follow-the-crop migrant farmworkers, mainly in the south of the country. The subject choice was not innocent since the law was a measure against the practices of agrarian chieftainship and the one that most upset the landowners by forcing them to hire unemployed workers from the towns and villages where the agricultural properties were. Considering the news referred to the occupation of agricultural properties by out-of-control laborers, it is understandable how the information circle ends. It is an attempt to reflect a scenic fear that mobilizes the landowners against what would be considered a communist revolution under development, tolerated by a weak government, in the face of urgency for taking exceptional measures, including resorting to the army. In this sense, the action of the conservative press, presenting the follow-the-crop migrant farmworkers as a threat, would have devastating effects on the future. The dehumanization of large sectors of the low income and working classes is a necessary step to understanding the subsequent bloody repression by the Francoist regime (Langa Nuño, 2007; Preston, 2011).

Next, we analyze the same theme, now in Brazil, in 1964. The long-lived and traditional newspaper OESP was founded in 1875 by a group linked to the interests of the Paulista coffee oligarchies committed to a liberal program. A historical adversary of the labor movement represented by the governments of Getúlio Vargas (1930–1945 and 1951–1954), from 1945 on, the daily politically aligned itself with the conservative wing

of national politics organized into the National Democratic Union. When Jânio Quadros resigned in August 1961, the newspaper reacted following its historical anti-Varguism, placing itself against the inauguration of the Vice-President João Goulart, the parliamentary solution, and the plebiscite that restored the presidential system.

The OESP went beyond political and media opposition, contributing to the destabilization of Goulart's government, mainly through Júlio de Mesquita Filho, director of the newspaper at the time, in a conspiratorial manner together with political, economic, and military groups in favor of the coup. He was the editor of a document known as "Roteiro da Revolução" (Roadmap for the Revolution), which guided some of the first actions of the coup plotters.

The 1964 coup was well-received by the newspaper, a fact acknowledged by the Grupo Estado in the historical summary on its website:

> editorially, the newspaper has always maintained its support line for representative democracy and a free-market economy. In 1964, "O Estado" supported the military movement that deposed President João Goulart after realizing he no longer had the authority to govern. However, it assumed that the military intervention should be transitory. When it became evident that the extreme right-wing radicals were increasing their influence to perpetuate the military in power, "O Estado" withdrew its support and turned to the opposition. (Grupo Estado, n.d., para. 2)

We analyzed texts published by the newspaper OESP in March 1964. According to the newspaper's online archive, the search results for the terms "agrarian reform"[3] indicate that March is the month of the year with more references: 63 results. In order to narrow the clipping, we selected the texts published on Page 3, the traditional space for opinion and politics, on the eve and immediately after the Rally of the Reforms, when Goulart announced the signing of the decree of the Superintendence of Agrarian Policy (SUPRA; Rio de Janeiro, March 13, 1964).

It is worth noting that the agrarian reform issue was very relevant to the online collection of the OESP in the early 1960s, a fact that would only be repeated after 1985, with the end of the dictatorship. In Brazil, in the early 1960s, social reforms were on the agenda of several political forces. Political parties, labor unions, the Church, military, and civil society discussed the need for comprehensive reforms to overcome Brazil's most serious structural problems: hunger, poverty, and social inequality. Among them, the agrarian reform was the most emblematic.

In the context of the Cold War, the United States government, with John Kennedy at its head, saw reforms as a possibility to combat movements of communism internationalization in Latin America. For this purpose, the United States of America committed

[3] The search for accurate descriptors produces distortions. The theme of agrarian reform is debated in other newspaper spaces beyond those presented by the online archive search with these terms. "Decreto SUPRA" (SUPRA Decree) or "reforma do campo" (rural reform) would be acceptable terms to produce a more comprehensive result about the coverage on the subject. In any case, we believe that the sample selected, although partial, is consistent with the objectives of this article.

itself, through the Alliance for Progress program (August 1961), to encourage reforms that would promote economic and social development in the region. The program was a chance for Goulart's government to overcome economic and political problems, besides moving forward with the reformist commitment defended by his government and assumed before his voters (Yamauti, 2005).

On April 15, 1963, Jango proposed a constitutional amendment that would allow the indemnification of expropriations with public debt bonds (payment in cash was the only option). The conservative party, the National Democratic Union, took a stand against the amendment. Goulart was pressed by the left (sectors that considered the imperialist reforms — excessively moderate, to the liking of the Yankees) and by the right (that by upholding cash compensation and "inviolability of the constitution", was able to block the reforms and, at the same time, destabilize the government, deepening the economic crisis). This political node nurtured the strong antagonism in the Brazilian political scene. It was one of the press discursive keys of that period since it articulated an argumentation that disguised the coup as if it were legal while imputing dictatorial and totalitarian tendencies to the Goulart government.

Jango chose to make the reforms his political instrument of communication with the masses, neutralizing the conservative discourse along the same lines as Kennedy (misery and inequality do not make a country prosper). He blames the conservative congress and the archaic Brazilian institutions for resisting the reforms.

In the discourse of the OESP, confronting and pressuring congress became synonymous with disrespect for the political game and, therefore, would confirm Goulart's supported totalitarian and demagogic tendencies. It became evident on the March 4, 1964 issue, on Page 3: "Goulart Decidido a Realizar Consultas Sobre as Reformas" (Goulart Decided to Hold Consultations on Reforms) reports that the president has decided to conduct officially — through the Brazilian Institute of Geography and Statistics — a national consultation of public opinion about the essential reforms, especially the agrarian reform. About this initiative, the newspaper states: "but obviously, Mr. João Goulart wants to obtain an instrument of political pressure to be skillfully maneuvered and imposed on Congress, *drawing out from its reforms in revolutionary terms* or serving for intrigue with the armed classes [emphasis added]" ("Goulart Decidido a Realizar Consultas Sobre as Reformas", *O Estado de S. Paulo*, March 4, 1964).

The survey was performed in eight state capitals between March 9 and 26, 1964. The results were not publicly disclosed at the time but were rescued in the 1990s by researchers from the University of Campinas archives. The survey indicated that 70% of Brazilians considered it necessary to implement an agrarian reform in Brazil (Dias, 2014). On the eve of the reform rally, the OESP speculates: "are some of Mr. João Goulart's advisors stimulating him to make a frontal attack on Congress, even with the very suspicious objective of testing people's reactions" ("Goulart Ainda Não Fixou as Diretrizes de Seu Discurso" [Goulart Has Not Yet Set the Guidelines for His Speech], *O Estado de S. Paulo*, March 6, 1964).

The constructed discourse regarding a possible popular consultation on the reforms illustrated one of the strategies of negative representation of the outgroup (van Dijk, 2005). It occurred in this case by projecting the unfolding facts from the government's actions. The latter, objects of intense speculation, were scrutinized and projected in a framework that placed Goulart in the position of an opportunist, demagogue, and anti-democratic. On the contrary, it did not occur with the opposition articulations, causing silencing of its potential consequences. The projection of the future is one of the ways through which journalistic discourses state an opinion (van Dijk, 2005). When commenting on the election of then-Minister of Labor Almino Afonso to the leadership of the Brazilian Labor Party in the house, the OESP stated:

> the objective now (...) is a new plebiscite, euphemistically called inquiry, or "poll", scheduled for May, from which Mr. João Goulart hopes to extract the constitutional reform that will allow him to enter the electoral campaign with the JG-65 "slogan" already printed on posters. ("A Penetração Lacerdista no PSD Preocupa Kubitschek", *O Estado de S. Paulo*, March 5, 1964).

Thus, according to the newspaper, the consultation is directly related to the political electoral purpose. Here we emphasize the choice of the word "plebiscite": it was the democratic instrument that restored the presidential system in Brazil, giving back to Goulart the powers taken away from him through the parliamentary solution of 1961. The OESP was against this plebiscite and unfavorable to its result. "Plebiscite" in the highlighted passage refers to the popular consultation that resulted positive for Goulart's government, against the OESP's wishes: a new plebiscite could only result in a new victory for the situation. The opposition had already clearly demonstrated its contempt for popular consultations.

The expectation about the reform rally that would take place on March 13 spread through the pages of the OESP:

> the days of expectation preceding March 13, the day of the SUPRA decree signing, have been alarming in some political circles and, particularly discouraging, in the most expressive centers of business classes, which some and others indicate as a likely bloody and sad date in the history of the Republic. ("A Penetração Lacerdista no PSD Preocupa Kubitschek" [Lacerdista Penetration into the PSD Worries Kubitschek], *O Estado de S. Paulo*, March 5, 1964)

Besides resorting to the expedient of projecting the (gloomy) future, the OESP used the resource of subject deletion in this excerpt, revealing the dynamic ingroup versus outgroup. "Some and others", "political circles", and "business classes" refer to vague, generic, undefined groups; on the other hand, the government's actions were embodied in the figure of the chief executive. "The simple signing of the decree would provoke land invasions in those areas of more acute friction, where the matter was posed in revolutionary terms" ("A Penetração Lacerdista no PSD Preocupa Kubitschek", *O Estado de S. Paulo*, March 5, 1964).

On March 13, 1964, at the reform rally in Rio de Janeiro's Central do Brasil railway station, Goulart announced the signing of the SUPRA decree, which established the expropriation of rural properties larger than 500 hectares along federal highways, railroads, and dams.

The next day, March 14, the OESP stated that the country lives in a "pre-totalitarian regime" and that after the rally, "it no longer makes sense to talk about democratic legality as an existing thing".

> When the head of the executive allows himself to make the apology for subversion in public squares and incite the masses against the powers of the Republic that hinder his March toward Caesarism, one can assume the dictatorship, although not institutionalized, is a "de facto" situation. ("O Comício" [The Rally], *O Estado de S. Paulo*, March 14, 1964).

Goulart dedicated a good part of his speech at the rally to explaining that agrarian reform would not subvert the capitalist relations of production. The model of indemnification proposed by the decree (public debt bonds) was current in several countries that had implemented reforms, such as Japan, Italy, and Mexico:

> agrarian reform with pre-payment of unproductive latifundia, cash on signing, is not agrarian reform. It is an agrarian business that interests only the large landowners, radically opposed to the interests of the Brazilian people. That is why the SUPRA decree is not agrarian reform. (EBC, 2015, para. 43).

For the OESP, the president's speech gathered "confused considerations" that "demonstrate false erudition". The indemnification in debt securities would constitute "pure and simple spoliation of the legitimate landowners" ("O Comício", *O Estado de S. Paulo*, March 14, 1964).

The OESP insisted on associating reforms and communism: "under the banner of 'reforms', the slogans of the revolution spread all over the country". For the newspaper, the "revolution was preached" with some "minor variations according to the needs of revolutionary strategy and tactics". As for Leonel Brizola, governor of Rio Grande do Sul and Jango's brother-in-law, who also spoke at the rally, "one would say he believed he was in the Russia of 1917" ("O Comício", *O Estado de S. Paulo*, March 14, 1964).

We see, therefore, that the analyzed journalistic discourse on agrarian reform allows access to the complexity of the political disputes of the period and reinforces that a better understanding is an essential aspect of public debate. Dezemone (2016) points to the need to broaden the understanding of "agrarian reform" at that historical moment. Unlike other issues, such as containing the rural exodus and economic development, property distribution did not always result in a consensus.

5. Comparison and Historical Awareness: A Proposal for Collaboration Between the Fields of Communications and History

We proceed to the comparative exercise: searching for the interconnected plates proposed by Detienne (2002/2004).

In the internal political environment, there are many similarities. In both countries, the progressive governments, committed to unions and popular movements, are in power now and are experiencing severe economic crises. In the face of that, we can assume that the responses presented by these governments point to a change in production structures that are considered archaic, unfair, and inconsistent with the economic, social, and human development projected by these leaders.

The oligarchic and conservative sectors articulate themselves around the defense of traditional values and the maintenance of privileges, supported by a discourse that naturalized injustices around conservative pragmatism, an instrumental legalism, and an authoritarian policy. In this sense, the agrarian reform issue takes on the leading role in the internal scenario and exposes the confrontation of the political forces in question.

In this comparative exercise, the political environment of antagonistic pluralism is an important interconnected plate. It places the progressive governments in Brazil and Spain in a delicate situation, pressured by the left and the right. In Brazil, the more radical left criticized the Yankee-style reforms. On the other hand, the conservative sectors, in any case, would prevent the Goulart government from accessing the resources of the Alliance for Progress, for it would make a leftist candidacy unbeatable in the 1965 elections. If implemented in Goulart's proposal, the reforms would undermine the oligarchy's socio-economic bases, having, in any case, effects on political representativeness. Thus, the elites would feel threatened, even if the measures proposed by the government were progressive and not committed to a revolutionary program. In Spain, the republicans negotiated and approved an excessively ambiguous reform program, refused by the anarchist movement and whose implementation would lead to a dramatic portrait of political radicalization. In Brazil, there was no consensus on the agrarian reform program, and the decree was a challenging "first step" (in the words of Jango himself, in his speech at the rally) for the elites.

The internal solid political antagonism brings us to another critical interconnected plate: the historical consciousness (Detienne, 2002/2004) of each period analyzed. In Spain, the context is the rising of fascism. This authoritarian wave engulfed the Spanish progressive movement and led the European continent to be the stage of a tragic world confrontation once again. In the Brazilian case, the external situation issue manifests itself in the direct intervention by Washington, reflecting the World War II results. On the one hand, the United States of America wooed the Goulart government with the promise of resources from the Alliance for Progress since Brazil was a strategic territory in the Cold War scenario; on the other, they financed congressmen and conservative organizations committed to maintaining "order" and representing North American economic interests in the country. In this international context of polarization, and with the press

support, the assumption that the reforms Brazil needed to overcome its economic difficulties and misery would happen peacefully or through a communist revolution became commonplace. The parliamentary arena does not show itself as capable of forming a stable hegemonic coalition to carry out the reforms. The press helps build the hegemony necessary to support an authoritarian solution of institutional breakdown, in an amalgam of class interests and a privileged discursive place, supported by an imaginary that places it "outside politics" and as the voice of public opinion. The coordinated discourse of the mainstream press forms a new and central interconnected plate to the analysis proposed in this article.

The newspapers analyzed, *ABC* in Spain and *O Estado de S. Paulo* in Brazil, are oligarchic sector representatives that remain in political control in their countries even after some agricultural development, as in the case of Spain in the 1930s and the case of Brazil in the 1960s. They operate the "placenta of the coup", that is, the set of activities to delegitimize politics and democratic institutions and anticipate and naturalize the authoritarian solution. It occurs through strategies that became evident by the discourse analysis of the selected newspapers, among them:

- demoralization of the government as a whole and the chief executive in particular. President Goulart was qualified as a coup-plotter in Brazil and was accused of ties to communism, populism, Getulism, incompetence, totalitarianism, and caudillismo. In Spain, the same is true for the republicans and their most significant leader, Prime Minister Manuel Azaña, accused of being a demagogue, chieftainship, and rancorous, and blamed for violence in the countryside;
- misrepresentation of the reform proposals, connecting them with the communist threat;
- anticipation and naturalization of the movements of conservative groups;
- erasure or disqualification of peasant and underprivileged class struggles;
- defense of instrumental legality: this is a movement that is perceived in the long term. The laws and the constitution serve the most varied rhetorical misrepresentations. In Spain, the monarchist right has not even accepted the plebiscite result of April 14, 1931, considering the republican government illegitimate. In Brazil, Jango's inauguration and the plebiscite that restores the presidential system are a cause for revolt among conservatives and fuel a discourse that serves both to accuse the Goulart government of authoritarian and illegal and lend the coup movement a convenient veneer of legality.

In the sphere of what Detienne (2002/2004) indicates as bridges of approach to historical consciousness, we also point out the question of memory invocation. In Spain, the conservatives evoke the antiliberal, elitist, glorious, and imperial past in front of a mass democratic stage characterized by decadence and dissolution of all values. In Brazil, they focus on the articulation of Jango with the dictatorial period of Getúlio Vargas, of whom Goulart is the political heir, and above all, on the linkage of the proposed reforms with assumptions such as the communist threat, coups, and attacks on the constitution.

The relation between historical consciousness and the press is articulated — in our proposal, supported by Sodré (2009) — in the conception of change assimilated as a media event, a position consolidated in modernity. In this sense, the comparative exercise performed in this article serves as a gateway to a specific understanding of production modes and approaches to journalistic discourses, understood as media interfaces

of the understanding of change in modern societies. In the Spanish case, a laboratory of propaganda techniques of all sorts of manipulation; in the Brazilian case, a sophisticated version of a grand ideological scheme fosters the "placenta of coups". In both cases, by placing itself as a privileged place of speech (in the Spanish case, a European opinionated matrix) or as a place outside politics, exempt and objective (in the Brazilian case, with a North American press matrix), the press grounds its legitimacy on the principle of the superiority of the discursive reason, nurturing what Sodré (2009) calls an "ideology of public transparency". In contrast, as we can observe in this analysis exercise, it builds a hegemony that highlights the relations between ingroup and outgroup (van Dijk, 2005) in the macro-structural level of discourse.

Translation: Camila Garcia Kieling

Authors' Contribution

Camila Garcia Kieling collaborated in the conceptualization, methodology and investigation of the proposed article. She participated in the overall writing process (writing – original draft; writing – review and editing). José Manuel Peláez Ropero collaborated in the conceptualization, methodology and investigation of the proposed article. He participated in the overall writing process (writing – original draft; writing – review and editing).

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Approximations and Distancing. Disaster Victims in *Brumadinho: A Engenharia de um Crime* and *Tragédia em Mariana*

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Abstract

In this article, we discuss two books that deal with catastrophes that occurred in Brazil recently: *Tragédia em Mariana* (Tragedy in Mariana) by Cristina Serra (Record, 2018) and *Brumadinho: A Engenharia de um Crime* (Brumadinho: The Engineering of a Crime) by Lucas Ragazzi and Murilo Rocha (Letramento, 2021). Although these works share similarities in formal and thematic aspects, we understand that they indicate different modes of journalistic approach to the world, with distinct ethical implications, particularly regarding how the victims of these catastrophes emerge in the reports. We consider that journalistic characters have a double existence: inside and outside the text. Furthermore, it is an ethical responsibility to reflect on how they are constituted, considering possible connections between one and the other. We propose, therefore, to discuss the modes of journalistic approach to such events from three articulated, analytical dimensions, using the two works. On the topic of "Indications of Listening and Authorial Presence", we focused on how the authors checked the information in their books, listened to the victims or investigated other catastrophes' records. In "Characters With(out) a Plot", we discuss who they are, whose stories are told in these books, how it is done, and possible effects. In "Project and Paratexts", we address the intentions declared by each author-reporter. We also examine whether or not they explore a book's potential as to the specific aspect of character development. Finally, we compared the approaches of other reporters to the representations of their characters to reflect on how each author-reporter of the works we analysed faces the catastrophe. We also examined what kind of journalistic record their postures reflect.

Keywords

reporting book, journalism, catastrophe, character, victim, ethics

Aproximações e Distanciamentos. Vítimas de Catástrofes em *Brumadinho: A Engenharia de um Crime* e *Tragédia em Mariana*

Resumo

Neste artigo, abordamos dois livros-reportagem que tratam de catástrofes ocorridas no Brasil, recentemente: *Tragédia em Mariana*, de Cristina Serra (Record, 2018) e *Brumadinho: A Engenharia de um Crime,* de Lucas Ragazzi e Murilo Rocha (Letramento, 2021). Embora estes trabalhos compartilhem similaridades tais como aspectos formais e temáticos, entendemos que indiciam diferentes modos de apreensão jornalística do mundo, com distintas implicações éticas particularmente no que concerne ao modo como as personagens vítimas dessas catástrofes emergem nas reportagens. Consideramos que os personagens jornalísticos têm dupla existência: no texto e fora dele, e é uma responsabilidade ética refletir sobre as formas como são constituídos tendo em vista possíveis passagens entre um e outro. Propomos então discutir, valendo-nos das duas obras, os modos de aproximação jornalística com tais acontecimentos a partir de três dimensões analíticas articuladas. No tópico "Marcas de Escuta e Presença Autoral", damos atenção a indícios de como os autores e autora apuraram as informações que constam em seus livros, colocando sua escuta junto às vítimas ou apurando outros registros das catástrofes. Em "Personagens (S)em Enredo", discutimos quem são aqueles cujas histórias são contadas nesses livros, como isso se faz e com que possíveis efeitos. Em "Projeto e Paratextos", abordamos as intenções declaradas por cada autor-repórter, bem como o quanto exploram ou não as potencialidades de um livro-reportagem no aspecto específico do desenvolvimento de personagens. Por fim, cotejamos abordagens de outros repórteres sobre as representações de seus personagens para pensar como cada autor-repórter das obras que analisamos aqui se posiciona diante da catástrofe e que tipo de registro jornalístico sua postura reflete.

Palavras-chave

livro-reportagem, jornalismo, catástrofe, personagem, vítima, ética

1. Presentation

In this article, we will cover two books about recent disasters in Brazil: *Tragédia em Mariana* (Tragedy in Mariana; Record, 2018) by Cristina Serra; and *Brumadinho: A Engenharia de um Crime* (Brumadinho: The Engineering of a Crime; Letramento, 2021) by Lucas Ragazzi and Murilo Rocha. Such works share similarities in the theme since both deal with the tragic events caused by the ruptures of mining tailings dams in the state of Minas Gerais; and the formal organisation under the names of the reporting books. Our premise, to be verified, is that despite this, they show different modes of a journalistic perception of the world, with different ethical implications. We are interested in discussing their approaches to the events they narrate, emphasising the conditions they offer for the emergence of disaster victims in these stories.

By emergence conditions, we understand that the victims' condition should not be taken as clear evidence to perceive the experiences surrounding such events. The epistemological shifts between dealing with knowledge based on someone's direct experience of a given situation and witnessing as a way of knowing (Leal & Antunes, 2018) need to

be considered. In journalism, these seem to imply the formation of a true community of characters.

We know from Serelle (2020) that journalistic characters have a double existence, unlike those that are purely fictional: in the narrative and the historical world. Their construction must observe possible limits and connections between the one and the other since what surfaces in the narrative can impact the lives that inspired them. Moreover, concrete existence imposes restrictions on the composition of the characters (Malcolm, 1990/2011). Attention to this trait is expressed, for example, in the reflections that Brum (2018) makes about his work, "A Casa de Velhos" (Old Folks Home). The author says that "no report is more important than a person", and "I have, sometimes, missed the best quotes of a story for the sake of this fundamental attention to the other" (Brum, 2018, pp. 111–112), pointing to the ethical horizon of her work.

Reading Mônica Martinez (2017), Serelle (2020) highlights the centrality of life stories in narrative journalism, which encompasses texts with formats such as profiles, major stories or books that articulate elements of literary prose. Through life stories, what would appear in daily coverage as merely "a number or a statistic, or even reduced to a single facet of the personality that serves the reported event" gains "biographical perspective, psychological complexity and social context" (Serelle, 2020, p. 45). We would add that this dynamic becomes particularly sensitive in the clipping of stories about catastrophes. In *Hiroshima*, by John Hersey (1946/2017), the entire narrative is structured around the stories of six characters presented to readers more than a year after the well-known explosion that decimated the Japanese city. The text "did not provide technical revelations or unknown data on the effects of the atomic bomb. Its impact came from Hersey's choice of focus and approach. (...) The horror had a name, age and sex" (Suzuki, 1946/2017, p. 168). In her speech, when awarded the Nobel Prize for her lifetime's work, Svetlana Aleksiévitch (1997/2016), whose texts investigate major events in the Soviet Union, like the explosion of the Chernobyl nuclear power plant, at the scale of ordinary individuals, said that what attracted her was "that small space – man... human being. In fact, that is where everything happens" (p. 372).

We emphasise that *Tragédia em Mariana* and *Brumadinho: A Engenharia de um Crime* cannot be completely seen as works written in the "literary journalism" tradition. Both have passages where typical narrative resources of a certain realistic tradition are recognised in narrating the facts, especially the description of entire scenes (Wolfe, 1970/2005). However, they are mainly books with stories that seek to denounce a crime, in the case of Serra's book, and document a police investigation, as Ragazzi and Rocha do, with no overt literary investment. However, as reporting books, they are expected to present a different approach from that characterising daily journalism, including regarding the characters in their stories.

In addition, the reporting book seems to have been constituted as a privileged, cultural object among reporters. In the story about the "new journalism", Tom Wolfe (1970/2005) says that the special reporters of the essays aimed precisely to conquer the conditions to leave them behind and then, idyllically isolated, to write "the book" that

would give them fame and wealth in return. Indeed, the reporting books were able, at this time, to cross geographic and linguistic boundaries that even the great stories of authors such as Gay Talese, Truman Capote and the above mentioned Tom Wolfe, published in magazines such as *The New Yorker*, *Esquire*, *Playboy* and other great magazines, did not cross easily. In Brazil, what was translated from these authors, and many others were primarily their books.

Then, the reporting books resulted from agendas that were better refined and developed than the stories prepared for periodical publications, and with the privilege of being done with more time, more resources and enjoying a more structured framework for dissemination and discussion. Through releases, criticisms and debates, they were constituted as journalistic objects from which we can expect more than we usually do from those made to inform us in the heat of the moment or keep us updated on different situations.

The understanding that the reporting books would be special objects among those that journalism circulates is updated in contemporary Brazil through speeches such as that of Daniela Arbex. According to her, one of her works, the *Holocausto Brasileiro* (Brazilian Holocaust), would be closer to historical document status than to that of fleeting, journalistic coverage. "The *Holocausto Brasileiro* is timeless. Some 50 years from now, when someone reads this book, it will remain current; it will remain necessary and fundamental", she said (Amorim, 2020, para. 43). Still, for the author, the book is detached from certain practices of the press, taking a supplementary path:

> I think it is part of our job to give visibility to important and distressing topics. It is a shame that the press cannot do it more often. Our coverage has deadlines and dates, so I see an advantage in my work because I have no deadline. After all, a book is timeless. (*Autora de 'Todo Dia a Mesma Noite', Daniela Arbex diz: "Eu não abandono a minha pauta"*, 2021, para. 4)

In their way, the authors of *Brumadinho: A Engenharia de um Crime* seem to indicate that they recognise the conditions given by the reporting book, as they write "from a privileged viewpoint, [there is] the intention to understand the role of each character in the gears of an environmental and human disaster with immeasurable consequences" (Ragazzi & Rocha, 2021, p. 12). In Serra's (2018) words, it is the book that would make it possible to overcome a repetition of the periodic coverage:

> when I thought of writing a book about the disaster of the Fundão dam, there was one number I could not get out of my head: the nineteen killed in the tragedy. This number was repeated in the news along with many others that tried to translate the extent of a socio-environmental calamity never before seen in Brazil: 34 million cubic meters of iron ore tailings dumped in nature; about 660 kilometres travelled by mud along the course of the Doce River; 38 municipalities affected; 14 tons of dead fish collected in the river; hundreds of thousands of basin dwellers without drinkable

> water. Journalism loves numbers. And, without a doubt, they are important. However, they cannot translate the human dimension of a catastrophe like this. They do not give a face to the story. It was necessary to show these faces, reveal their identities, and give them a voice. (p. 14)

Tragédia em Mariana proposes to tell, as the work's title states, "the story of the greatest environmental disaster in Brazil". In 51 chapters, it addresses the collapse of the Fundão tailings dam in November 2015 and the story of its licensing, construction and operation. The book also reflects on mining history in Minas Gerais and its relationship with politicians and oversight bodies. It dedicates several chapters to the victims of this catastrophe — those who survived and those who succumbed, those directly affected by it and those indirectly suffering its impact (Serelle & Pinheiro, 2021). Some 3 years after the disaster, the publication investigates and puts some facts in perspective. Therefore, one of our hypotheses is that, due to this timeframe, it is quite different from *Brumadinho: A Engenharia de um Crime*, written and launched in the same year as the catastrophe it focuses on, 2019.

We propose, therefore, to discuss the modes of journalistic approach to such events from three articulated, analytical dimensions, using the two works. Initially, we reflect on possible implications, from the time of this writing and investment in the journalistic investigation, that reveal *indications of listening and authorial presence* — indications of how the authors and author checked the information in their books. Then, we use the observation of traits in both works as to what they offer as elements for understanding how victims emerge as characters in these stories and the ethical implications arising from the choices made by each author. Thus, we deal with the following aspects: *characters with(out) a plot*, in which we will discuss who they are, whose stories are told in these books, how it is done, and with what possible effects. We also examine the *project and paratexts* as axes through which we will discuss the intentions declared by each author-reporter (Marocco, 2020) and how much they explore, or not, the potential of a book for the specific aspect of character development. Finally, we direct our final comments, comparing approaches from other reporters on the representations of their characters, to think about how each author-reporter of the works analysed herein stands in the face of the catastrophe and what kind of journalistic positioning these positions reflect.

2. Indications of Listening and Authorial Presence

Certain contemporary news reports present metanarrative elements through which their authors can reflect, for example, on the ethical, investigative and writing challenges they faced in conducting their work. In the news reports that we addressed in this paper, we were interested in these metanarrative elements according to what they indicate: the quality of the time devoted by their authors to produce the works. It is also important to note that these elements reveal the reporters' listening to each story, considered here not merely as a passive gesture of listening to other people's stories followed by their transcription and formatting in a text that claims to be journalistic. Listening, as Eliane

Brum (2021) suggests, would be closer to the common construction that reporters and their sources make of a story, with personal implications included for both parties:

> to listen is to "lend" my body to the words of another[1]. It is an experience that resembles possession, but it is not. My body, me, is an active mediator of the other voice. Clearly, making that voice a word written by me requires delicate mediation. It is the narrative of another, the experience of another, the words of another after they cross my body. However, my body is not an absolute void through which another's narrative passes unaltered by the experience of passing through me. (p. 60)

For example, in a chapter in *Tragédia em Mariana*, Serra reports a Christmas spent with affected families, the year the Fundão dam collapsed, 2013. Working at that time for the television program *Fantástico* (Fantastic), the author was committed to covering the catastrophe from its onset, could actively listen, as we mentioned, and bring to this narrative a series of elements indicating the families' conditions in that circumstance. Maria Lúcia

> couldn't get used to the rhythm and noise of the city. "I miss my airy house, feeling the air rushing through the windows..." It was also strange to use things donated by anonymous persons or bought by Samarco. On a few trips to the ruined village, she recovered small pieces of her shattered daily life. The gas cylinder cover, dishtowels, tablecloths, quilts, a blender, a thermos, crockery, and a duvet. "I washed, bleached, and am happy to use things I used in Bento Rodrigues". (...) Before lunch, Mrs Maria Lúcia said her prayers. "We have to thank God because we are alive. We won't forget, but we shouldn't just dwell on the past, either. We had a life lesson, and we have to be strong to start over". (Serra, 2018, p. 100)

Through descriptive passages like this, Serra talks about being with those affected during their first reflections and shows us some of them. These are words of pain, quite typical of those who have just suffered a catastrophe, but also of resilience, able to put into perspective something as devastating as the loss of their homes and the various bonds with the community they lived. In the book, besides the excerpts that indicate Serra's listening during the first months following the catastrophe, there are also passages through which one can perceive the continuity of this work. For example, in the final chapter of *Tragédia em Mariana*, the stories of some people whose trajectories were told in the news report are resumed. Among them, Maria Lúcia's:

> in Mariana, the family would be accommodated in a house on Santana Street, near the historic centre. They received there the visit from the still-CEO of Samarco, Ricardo Vescovi. He wanted to know if they were well settled in. "He apologised to us. He was desolate. I felt sorry for him", said

[1] The author word "outre" in the original Portuguese version as part of an inclusive, non-binary language.

> Maria Lúcia. However, as investigations revealed the mining company's management's knowledge of the dam's risks, feelings changed. "I didn't feel pity anymore, no. But I would welcome him back. I only completed the fourth grade, but ignorance is a word that's not in our dictionary. You don't take the law into your own hands". (Serra, 2018, p. 444)

The continuous listening to which we refer seems fundamental to us, so speeches like Maria Lúcia's are brought to light and allow her construction to be complex as a character in a report in a book. She is a victim who does not intend to forget what was done to her but will not dwell on the horror. She changes her perspective about those responsible for the catastrophe that changed her life, but she keeps her values. Through the speeches dispersed throughout the book, she appears as a character full of nuances — just as we imagine in the historical world. Although this complexity has been present since her first statements, we understand that the extended time of journalistic listening has allowed her unique characteristics to emerge once again, as if in confirmation.

In *Brumadinho: A Engenharia de um Crime*, the entire process is concluded in the same year as the catastrophe narrated, 2019. The indications of listening and authorial presence of Ragazzi and Rocha are scarce. In this work, the self-referencing excerpts seek to highlight the sources on which the authors based their work, such as when they write that the "sequence of events narrated in this chapter is essentially built by the crossing-referencing of data done by the team of the deputy Luiz Augusto Nogueira" (Ragazzi & Rocha, 2021, p. 73). Later, they state that

> to write this reporting book, the authors relied on the abundant documentation raised by the investigative bodies, especially by the task force of the Federal Police through inquiry 62/2019, chaired by deputy Luiz Augusto Pessoa Nogueira, and interviews and depositions by persons directly or indirectly involved with the routine management, monitoring and validation of the conditions of the Dam I of the Córrego do Feijão mine, in Brumadinho. (Ragazzi & Rocha, 2021, p. 209)

There are few passages in this book dedicated to the catastrophe victims, among which Chapter V, "Enterrar Seus Mortos" (Burying Their Dead), stands out. It tells the story of Maria de Lourdes and her family. She lost her sister and son-in-law in the landslide and, sometime later, saw her nephew being taken away from the city where they lived because the child's father could no longer live there. "Another dam fell on us" (Ragazzi & Rocha, 2021, p. 60). Such stories, however, are exhausted in these terms without being resumed or put into perspective. Therefore, we do not know what happened to the victims following the disaster from reading the text. Moreover, we cannot observe them beyond what they feel when the pain of the loss is still more acute. Thinking about the metanarrative aspects in this regard, we have very few elements for knowing about the ethical guidelines that professionals have sought to follow, such as obtaining informed consent of the victims to report their stories and make them public domain and taking

possible care to avoid so-called re-traumatisation. Nor can we understand, from these passages, whether the authors stood next to the victims to listen to them.

Although both reporting books, *Brumadinho: A Engenharia de um Crime* and *Tragédia em Mariana*, show signs of very different authorial and investigative investment. Attention to documentation is significant in both works. However, Serra's book shares space with an extensive follow-up of the victims, which allows them to appear more complexly in the text. They appear as nuanced characters who suffer and put the catastrophe in perspective because it is expected that other feelings are manifested regarding the trauma after a time of initial shock. In Ragazzi and Rocha's book, it seems that the victims appear as if they are fulfilling a previously designated role, which is smaller than the other interests of the book. In this work, the authors' listening takes the police investigation as the guide and emerges with a structure similar to daily coverage.

There is no prescription in journalism as to how to approach an episode. For example, it can be done using authorial, documentary, anthropological, psychological, or police investigation as resources. In this sense, the solutions adopted both by Serra and by Ragazzi and Rocha are journalistically validated. In these works, we seek to observe whether there is a difference regarding the emergence of the characters when one chooses one path or the other and what deserves attention. In this sense, we call attention to the effect of reporters committing their presence and listening to the victims. It serves as the recognition that the words of these people have value in themselves, without intermediation, together with the reporter's words. We should remember that the stories produced journalistically can recur on people in the historical world. In these cases, people had a trajectory of struggles strongly marked by the catastrophe that shook them. It is, therefore, worth reflecting on whether a certain mode of emergence positions them to the readers more as what they are in a context of disputes, agents or subjects, or as what they are according to a simplifying mediation such as a police investigation report, as something close to deponents, people whose statements have a more limited purpose.

3. Project and Paratexts

The privilege we mentioned in *Brumadinho: A Engenharia de um Crime*, being given for the police investigation and the investigators who worked on the case of the collapse of the B1 dam in Córrego do Feijão, is explicit from the book's cover. Besides the title and a photograph showing an office stained by mud, it reads that the book is "based on the investigations of the Federal Police deputies Cristiano Campidelli, Luiz Augusto Pessoa Nogueira, Rodrigo Teixeira, [and] Roger Lima de Moura". The names are in bold type as if they were signing the work's authorship, together with Ragazzi and Rocha. These police officers' photograph opens a series of images as the book ends, preceding another with the journalists and a firefighter. There are no pictures of the victims. In a session entitled "Por Que Este Livro?" (Why This Book?), prior to Chapter I and after the acknowledgements, the authors write that

> there is no search for punishment or revenge in the narrative, much less the purpose of electing or impersonating heroes and villains. There is, rather, from a privileged point of view, the intention to understand the role of each character in the gears of an environmental and human disaster with immeasurable consequences. The content published in this book is not confidential under the law and has been obtained through interviews and authorised access to public documents, depositions and parts of non-confidential judicial proceedings or already published in the press. (Ragazzi & Rocha, 2021, p. 12)

The paratexts or the passages of *Brumadinho: A Engenharia de um Crime* do not appeal to an "untold story" or the "catastrophe victims' perspective". In this sense, the book is straightforward in fulfilling what it proposes: to approach the story from what the police investigation provides. The absence of mention indicating close listening to the catastrophe victims gives us elements to think about the questions we raise in this work about their emergency conditions. If they are not even considered in the book's proposal, there would be no reason to read the work, considering how they appear in the text. However, the problem is that, despite the focus declared by Ragazzi and Rocha, the characters of the catastrophe's victims appear, in formal terms, as described in the previous section. They are only mentioned in lists more than once.

Tragédia em Mariana, on the other hand, highlights the victims of the catastrophe it narrates in several of its paratexts, besides, as we said, the chapters that focus on their stories. The cover shows a vast area covered by mud where some rescuers work. Its first lines read, the "book is dedicated to the victims of the greatest socio-environmental tragedy in Brazil", directly mentioning two of them — Romeu Arlindo and Paula Geralda Gomes. The introduction, the content and the photographs draw attention to these characters. In the introduction, for example, Serra (2018) states that

> understanding a tragedy of this magnitude, from its multiple perspectives, would not be within my reach without the extreme generosity and trust of those who told me their life stories before and after November 5, 2015. Among them are the relatives of those who were swallowed up forever by the waves of mud; the victims who survived, injured in body and soul; and the dozens of residents of the Doce River basin somehow affected, whether by the loss of community ties, assets, employment or their livelihood previously provided by the river. (p. 14)

The people, as we said, are central to the reporting books. Apart from the stories about catastrophes mentioned in the introduction of this work, they star in famous works such as *O Jornalista e o Assassino* (The Journalist and the Murderer), by American journalist Janet Malcolm (1990/2011); *O Segredo de Joe Gould* (Joe Gould's Secret), by American writer Joseph Mitchell (1965/2003); and, *Ricardo e Vânia* (Ricardo and Vânia), by Brazilian journalist Chico Felitti (2019). In some reporting books, the characters seem to play a less central role, as individuals whose unique stories stand out and appear well

constructed but appear strong in the text like several others. Some examples include *Fame & Anonymity*, by the American Gay Talese; and, somewhat differently, *República das Milícias* (Militia Republic), by the Brazilian journalist Bruno Paes Manso (2020). In these books, the protagonism seems to be distributed among several life stories, approached in a complex way but without elements presenting greater depth in the biographical characterisation. Clearly, the reporters have the autonomy to approach characters in scope and intensity. We propose to think about how the books analysed have exercised this prerogative. Hence, according to the paratextual elements we analysed, we observed a difference in this endeavour. In *Tragédia em Mariana*, the characters, especially the catastrophe victims, are prominent figures. In *Brumadinho: A Engenharia de um Crime*, this distinction is given to the investigators. It is worth thinking about its effects.

4. Characters With(out) a Plot

Tragédia em Mariana features a wide range of those who may be considered affected by the catastrophe, but there is also an effort to put their stories into a plot. So, we know that

> Marcos Aurélio Pereira de Moura, 34, the chemist, was at a special time of his life. In professional ascension at the company Produquímica in São Paulo, he had recently bought the apartment where he lived with his wife, Lira, 32. They both had plans. (Serra, 2018, p. 63)

Marcos was one of the 19 people dead in the mudslide, and his story is told through his partner as weaving a tribute. Filomeno da Silva, "informal historian of Bento Rodrigues" (Serra, 2018, p. 286) talks about the loss of his house. However, before he recovered several of his trajectory elements, he founded a football club, the Community Association, and looked after the community church. The effort to tell the stories of the living and the dead is a hallmark of this work. The catastrophe affecting all the characters is like the engine of this book, but the unique trajectories of people affected by it are what set the pace. Including the characters in a plot means incorporating their stories into the narrative beyond a pre-established role assigned to them, such as exemplifying a certain phenomenon. It means, in this case, that telling the story of the greatest socio-environmental tragedy in Brazil is also telling the stories of people affected by it. It means giving time not only to the elements most directly linked to the catastrophe but also to events that allow characterising the lives of these characters in a more comprehensive way.

Brumadinho: A Engenharia de um Crime does not seem to have this introduction. It even explores narratively events that occurred with the investigators: "on July 9, 2016, ignoring the cold weather of the early evening, Deputy Roger stopped the car near his home and walked into a bar in the neighbourhood" (Ragazzi & Rocha, 2021, p. 43). However, it only mentions a sequence of ordinary events in their lives when it comes to the victims' stories. It happens in Chapter XII, "Em Busca das Últimas Jóias" (The Search for the Last Jewels), dedicated to the efforts of the rescue teams searching for the missing more than

200 days after the catastrophe. About Robert Ruan, the assistant general missing during the flood, they write he was

> the striker of the Brumadinho Football Club amateur team. He dreamed of being a professional player. He even tried out for Atletico but was turned down by the youth team. Three months before the tragedy, Robert's older brother was murdered. (Ragazzi & Rocha, 2021, p. 174)

The feature, here, seems to be to approach one life through a sequence of events that, however, do not influence the directions of the narrative. They expire once presented since these characters and their stories do not recur in the text. About other workers, they write:

> the welder and mechanic, Renato Eustáquio de Souza, 31, was having an important day; he was full of expectations. After nine years at Vale, he participated in training at the Córrego do Feijão mine. If all went well that Friday, he would be promoted and further assist his wife in raising their two daughters. The 34-year-old machine and equipment oiler, Tiago Tadeu Mendes da Silva, with just a few months of work at the complex in Brumadinho, could not wait to return home to Barreiro, Belo Horizonte, on the last weekend of January to enjoy his children – a new-born boy and a 4-year-old girl. Shortly after noon on January 25, 2019, Tiago, as he always did, went to Vale's cafeteria. On the menu, there was feijoada. (Ragazzi & Rocha, 2021, p. 171)

We understand there is a difference between disposing of a series of events such as the loss of a relative, the lunch of the day, a promotion, and a narrative about them which would seek to connect them, give them meaning, or even articulate a tribute. That often occurs in the reports about people who died — a possibility that probably emerges from direct contact with the surviving victims. In *Brumadinho: A Engenharia de um Crime*, the stories of the victims do not seem to influence the narrative. They are not part of the plot. It seems that, in this book, it would be possible to tell the story of the catastrophe without resorting to the unique trajectories of the people affected by it. When they approach these stories, the reporters do so as if they were police documents, with a listening whose objective is clear: the production of a denunciation piece. The victims are thus revealed from documentary artefacts more related to other fields, such as forensic or medical forensic procedures, featuring in reports or examinations. Details and traces that make the "materiality of the victims" and certify their existence but partly contradict the action of the author-reporter obliterating the elements of another journalistic approach and its ways of interpolating the pain and suffering that one wants to hear.

Through this approach, we know that certain people are victims, but not how they are victims. It is worth saying this has been a known fact since their names were first listed as those of individuals who lost their lives, or people close to them, in the mudslide.

5. Approaches and Distancing

We understand the unique way many victims are presented in Serra's book, with attention to their trajectories, is related to how the author listens and the proximity she decided to have with them. That is evidenced by passages highlighted in "Indications of Listening and Authorial Presence" and commitments she declares in her book's introduction, such as those indicated in "Project and Paratexts". The reporter places herself in the scene and derives her perspective from there: closer to the people affected by the disaster, we would also say more deeply, in line with what a reporting book can be.

The path is different from *Brumadinho: A Engenharia de um Crime*, in which proximity to the victims does not seem to be decisive. In constructing this reporting book, Ragazzi and Rocha favoured another approach to the catastrophe — through the police investigation around it. It also derives its narrative perspective from it and the emergency conditions of the victims. They appear more as deponents whose trajectories do not seem to direct the document they produced, which declared aim is to tell the story of the police investigation. In this work, those affected are not probed even in their position on this investigation — its speed, apparent efficiency, diligence or the impacts it would produce in their lives.

Such differences and nuances relate to internal procedures when doing journalism, and, in the key of cultural analysis, they deal with the perception of journalism as a contextual and situated practice (Escosteguy, 2012; Zelizer, 2017). Both the way of allowing the victims' words to emerge and dealing with the reporting of catastrophic events indicate particular cultural modes crystallised in this journalism embodied simultaneously in the Brazilian reporting book. On the one hand, it stands out as a kind of praise of anonymity, as the celebration of ordinary life. Eliane Brum (2012) translated it as the "insubordination of the gaze". It is the gesture of "telling the anonymous dramas as epics that they are, as if each average Joe were a Ulysses, not by favour or charity, but because each average Joe is a Ulysses" (Brum, 2012, p. 187). In the reporting book thus adapted, the presentation of a paratheory gains prominence. It seems to touch emphatically on points such as the ethical dimension of the encounter with the other; of the possibilities and impossibilities of language to account for experience in contemporary journalism. In addition to incorporating reflexivity, the reports express less confidence in talking about what is real. We perceive in them the suspension of narrative authority before a world that seems difficult to interpret. Faced with what is complex, the narrator repeatedly asks how to approach it.

From another perspective, relying on approaches and epistemes typical of other fields (judicial investigation; police investigation), the cultural form of the reporting books that report on catastrophes updates the journalistic claim of anchoring the narrative in the "facts", "truth", and "reality" of world events. Thus, it reiterates that its legitimacy is based on the narrative ability to index and reference the world of tragic events based on the presentation of the victims' "story", especially the fatal victims, with accounts that tend to "exalt" the characters from a normativity of the current condition of the victim.

We do not discuss the "accuracy" of the victims' representations, but we recognise the importance of making them more nuanced. In the books analysed, that is a consequence of proximity, assumed or only "suggested" by the authors, with the people whose stories are told. Ultimately, a journalistic representation will always be incomplete compared to the subject that inspired it, as Fabiana Moraes (2015) acknowledges regarding Joicy, the focus of the report *O Nascimento de Joicy* (The Birth of Joicy). In that book, she followed the gender reassignment and other transformations in the life of this peasant woman. Reflecting on the recognition the work obtained with the Esso Report Award, Moraes (2015) notes that it was given to the media clipping that she produced of the character because "Joicy, of course, is much larger than the series in which I portrayed her" (p. 19). Agee and Evans (1939/2009) also demonstrate awareness of the distance that a journalistically constructed character maintains regarding the socio-historical individual it addresses. However, for the authors, this precariousness of equivalence is no excuse for giving up the attempt to narrate them. They write: "I must mediate; I must try to record the strange, warm human lives of each of you within your world. And this cannot be done lightly: not lightly, or briefly, not at all: nor with any hope of 'success'" (Agee & Evans, 1939/2009, p. 107).

The proximity to people who have become characters also seems to have a high personal cost for reporters. Mitchell (1965/2003), for example, recounts the personal implications that touched him after the publication of "Professor Sea Gull", in which he focused on the story of Joe Gould, a poor man who introduced himself as a writer in the bohemian Greenwich Village. When the report was published, the exhibitionist artist never stopped looking for him, asking him to listen more, write more, financially contribute, to share his workspace with him in the newsroom of *The New Yorker* — until they broke up. Similarly, Moraes (2015) reports on Joicy's demands on him — more: the woman's mistrust after many months of exchanges and close follow-up.

> "Some even say you've been keeping all the money you're supposed to give me", Joicy said, speaking from a phone nearly 300 kilometres away from me. I was almost used to hearing absurdities of different degrees in our conversations for over a year, but the sentence was fulminant. First, it shut me up. Then it hit me. A sad, measured indignation sunk in, the kind that clearly shows us that, from then on, no action will be profitable or help maintain things. On the contrary: it needs to stop. (Moraes, 2015, p. 91)

Furthermore, for Moraes (2015), pain, sweat, awe and joy "are invariably present in the relationship established between journalist and character — especially when this relationship goes beyond a brief encounter permeated by a few questions, a 'thank you' and an illusory 'see you later'" (p. 17). Like Gould, who recognises having been seen socially in a new light since Mitchell told his life, the characters in a journalistic narrative gain a new layer of existence once they are narrated. Herein lies part of the reporters' ethical responsibility, so the "see you later" the parties say each other would be illusory. The aspects concerning the victim characters, their conceptualisation, the normative

factors related to their stories' formulation, the affective dimensions and the role of empathy in approaching such subjects, and the ethics in using such accounts are not settled only in the announcement made by these journalistic projects which make listening to the victim's stories part of their practice as an instrument of actions aimed at expanding the public knowledge and repairing rights.

As seems to have been the case in *Brumadinho: A Engenharia de um Crime*, it is possible to maintain an extended distance from the people whose stories are told. In the case of Ragazzi and Rocha, however, what they did through the distinction given to the police document does not create an ethical solution to the problem of placing a representation in the world that, as we know, can recur on these people. In not noticing an emphasis on issues about how to deal with personal stories of victims, about the morally delicate balance between listening to such stories and spreading them through the strategy adopted in the book, victims appear as characters whose unique trajectories are less important, whose speeches have a pre-established place. More like how daily journalism carries out its news coverage than how a reporting book can address a catastrophe.

6. Final Remarks

As we pointed out in the introduction to this text, many books produced in the 20th century have dealt with catastrophes. *Hiroshima*, by Hersey (1946/2017), is emblematic — "no other story in the history of journalism has had the repercussions of Hiroshima. The approximately 300,000 copies of *The New Yorker* magazine, dated August 31, 1946, quickly sold out in the newsstands", Suzuki tells us (1946/2017, p. 161). "From all over the country and abroad, requests for permission to reprint the story were reaching the newsroom" (Suzuki, 1946/2017, p. 161). What was most special about this report was the focus on the lives of six people — among thousands — affected by the bomb. It allowed us to learn more about how the city and people were destroyed by the bomb.

The focus on the lives of the people affected by a catastrophe, such as the Chernobyl nuclear power plant explosion in 1986, gave the *Vozes de Tchernóbil* (Voices of Chernobyl), by Svetlana Aleksiévitch (1997/2016), its prestige and recognition. Her work includes other books where the author investigates "the history of 'domestic' socialism, 'internal' socialism. The socialism as it lived in the human soul" (Kuruvilla, 2016, para. 10) and still made of other catastrophes was awarded a Nobel Prize.

In Brazil today, many reporting books have been dedicated to the catastrophes happening in our country. In fact, the reporter, Daniela Arbex, seems to be specialising in these stories. In one of her books, the *Holocausto Brasileiro*, she tells the story of Hospital Colônia, where about 60,000 people deemed sick or unsuitable for the Brazilian society of the 20s died. *Todo Dia a Mesma Noite* (Every Day the Same Night) is about the fire that in 2013 was ignited in a crowded nightclub in the South of Brazil and caused the death of 242 people. And, *Arrastados* (Dragged) about the collapse of the Brumadinho dam.

In most of these books — here we include Cristina Serra's — the centrality of the sources is remarkable and often declared through statements such as those analysed in

"Project and Paratexts". Thus, the commitment to telling the surviving and deadly victims' stories is on the horizon of the disaster-reporting books in Brazil. However, for this horizon to be ethically strong, the intention to narrate them is not enough. Their authors must also commit to how they do it — which we indicate in "Indications of Listening and Authorial Presence". Through the books that we compare here, we observe two perspectives. One is close to the characters, such as Cristina Serra's, and seems to pursue this ethically strong horizon we have discussed. The other perspective, addressing the characters without taking their trajectories as defining factors for the story of the catastrophe it tells, such as Ragazzi and Rocha's, suggests another position. This perspective is anchored in journalistic practices validated in the most common practices in the newsrooms of periodicals. However, it seems to lack the complexity that does justice to the sensitive dimension of the stories it narrates. Both perspectives by claiming, on the one hand, that the journalistic narrative is based on the tradition of presenting the "facts", the "truth", and the "reality", or, on the other hand, that the narrative operates with protocols based on reflexivity, on the strength of subjectivity and engagement, point to the relevance of understanding these reporting books and their journalisms as a cultural form, whose analysis perceives them as contextualised and situated practices.

Translation: Peter Laspina

Authors' Contribution

Carlos Henrique Pinheiro developed conceptualisation, investigation, writing – original draft, and writing – review and editing. Elton Antunes developed the conceptualisation, investigation, and writing – review and editing.

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Book Review of *Rockonomics: A Backstage Tour of What the Music Industry Can Teach Us About Economics and Life*

Recensão do Livro *Rockonomics: O Que a Indústria da Música Nos Pode Ensinar Sobre Economia e Sobre a Vida*

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Krueger, A. (2020). *Rockonomics: O que a indústria da música nos pode ensinar sobre economia e sobre a vida* (L. O. Santos, Trans.). Temas e Debates. (Originally published in 2019)

Rockonomics (Krueger, 2019/2020) is — so far — the only posthumous work left by Alan B. Krueger, and it is a work in which the author explores multiple facets of the music industry. Krueger, professor at the University of Princeton with a vast academic production, columnist for *The New York Times*, chief economist of the United States Department of Labor during Bill Clinton's presidency and, amongst other titles, chair of the White House Council of Economic Advisers during Barack Obama's, became a familiar name for the general public with his first book, co-authored with economist David Card. In *Myth and Measurement: The New Economics of the Minimum Wage* (Card & Krueger, 2016), published in 1995, the authors aimed to rebut the popular idea that increasing the minimum wage is damaging to a country's economy or leads to a rise in unemployment rates. They analysed the academic works that supported those conclusions and the empirical consequences of raising the minimum wage in states such as California or New Jersey. His fifth book was published just months after his passing in 2019 and presented us with theories that are hard to ascribe to a sole economic field but noticeably influenced by the developments in behavioural economics and distanced from the *homo economicus* ghost, which so often hovers above economic analyses of microcosmoses. Krueger does not expect consistently rational decisions by the individuals he studies, nor does he minimise the importance of factors such as emotions, luck, or simple whims when it comes to decision-making and economic success.

Krueger acknowledges he was not the first to use the term "rockonomics", but he makes his own use of it, albeit quite broad: in the author's definition, rockonomics refers to the economic principles that drive the popular music industry, from the negotiation of recording contracts to the sale of second-hand tickets. In the first chapter, he summarises the seven key concepts of rockonomics:

- "Supply, demand, and all that jazz" (p. 15): as in other markets, supply and demand determine prices, but other factors come into consideration in music, such as the risk that, by increasing prices, an artist could be perceived as too greedy by his or her fans. In this essential principle, Krueger already takes into consideration both external agents (ticket scalpers, driven only by profit) and emotional factors (the need for the price to seem fair to the public, even if this public is not familiar with the costs of event production or music recording).
- Scale and non-substitutability: the combination of these elements is considered essential to forming superstars. It is necessary to reach a large audience, but a slightly inferior alternative is always insufficient and cannot replace the product, service, or musician that the audience wants.
- The power of luck: not only is luck a part of every market but its power is magnified in a superstar market. The release of an album at the right time, even if by mere coincidence, can determine the success of an artist's career.
- Bowie theory: making use of the observations made by David Bowie in a 1999 interview, in which the singer states that music would soon be everywhere and that concerts would be the main source of income for musicians, Krueger stresses the importance of complementarities in music — everything beyond recorded music, from concerts to video clips and merchandise.
- Price discrimination: getting customers who can or want to pay more to do so is an effective strategy for airlines and, for Krueger, that can be highly profitable in the music industry as well, from segmenting seats in live music to launching collector's edition albums.
- "Costs can kill" (p. 18): *Baumol's cost disease* is a term that refers to the increase in costs in sectors with stagnant productivity, and William Baumol, who identified the phenomenon, used a Schubert string quartet as an example. Be it today or 200 years ago, its duration and number of performers remain constant; with that in mind, it becomes necessary to control the possible increase in costs of a product or artist that dramatically increases its sales.
- Money isn't everything: Krueger ascribes the music industry's perseverance to several factors, from its emotional power to creating social occasions and special moments that later turn into powerful memories.

Each of these seven concepts inspires one or more of the 11 chapters that make up this volume, despite the inevitable overlap in some instances and the greater or lesser emphasis placed on sub-contexts. It is not surprising that the chapter devoted to the economy of live music is the longest one, but Krueger does not underestimate the possibility of changes in the streaming universe or the importance of copyright in a lucrative music industry. He points out, as a counterexample, the Chinese market, which he considers incredibly promising, but hampered by censorship issues and the lack of control in terms of song usage, both regarding plagiarism and the payment of royalties.

Presenting a complex industry to a wide audience while having to explain inescapable legal or economic concepts in layman's terms is no easy task. However, Krueger writes with clarity and can effectively compartmentalise his topics to expand on each one, using numerous examples to reinforce the concepts mentioned above. There is no real innovative theoretical contribution, but rather an attempt to systematise and corroborate the arguments of Bowie, Baumol, and Sherwin Rosen (who has demonstrated the necessary factors for the creation of superstars). The author's writing is persuasive, and his analysis and explanation of economic principles in the music industry stand out as his comfort zone. Nevertheless, despite his efforts, the contradictions and selectivity in the choice of sources reveal, frequently, that Krueger tends to look for premises that lead to the conclusions he had decided to present.

Some of these contradictions may owe to a lack of terminological rigour. Krueger says there are more and more solo artists (i.e., without a band) at the top of the sales charts and that the most likely reason is the ease that technology has brought to the music creation process, allowing that process to be completed through a smaller number of individuals than in the past (p. 79). Soon afterwards, reflecting on the fact that there are more and more collaborations and that successful songs have more and more composers, the author states that there are several possible explanations for the phenomenon, including the greater complexity of modern music and the need for specialists in different musical aspects (p. 80). With the author's emphasis, in so many instances, on the processes behind musical success, it is surprising that the distinction between performers (public figures to whom a given song is attributed) and artist-composers (who may write songs for former without getting involved in recording or performing) is implicit.

In another instance, Krueger shows that the live music market (which has been the main source of income for musicians for several decades) is not only profoundly unequal but that this inequality has grown, despite the democratising effect of technology. In 1982, the top 1% of artists collected 26% of this market's revenues, whereas, in 2017, the same 1% took home 60% of revenues (p. 102). Although the analysis that follows is pertinent, as it runs against the idea that the music market has become more equitable in the digital age, it should be stressed that revenues in this percentile increased by more than 15% between 1982 and 1984, and no explanation is provided for this increase (we note that one of the main reasons was the popularisation of the CD) nor for the choice of 1982 as Krueger's chart's starting point. When analysing the profits of the recording industry and presenting a chart also ending in 2017 (p. 43), Krueger's starting point shifts to the year 1974, again without justification.

Even though the author often presents sources for his claims, these can be quite selective as well: when resorting to a journalistic source to attribute current CD purchases to car owners (p. 209), Krueger omits the other motivations listed in the article, such as nostalgia or an ingrained habit of buying them. The reason can be understood from the context: Krueger intends to argue that streaming will be replacing the purchase of CD; as cars with CD players cease to be sold, the primary motivation for buying music in this format would thus be eliminated.

The weight that Krueger attributes to luck in success is, perhaps, one of the greatest strengths of this book, as this is done in a way that does not devalue the work of musicians and music labels. Krueger deconstructs meritocratic visions by combining various examples, such as the reluctance of some labels to sign contracts with the then-unknown Elvis Presley or The Beatles, and an outlaying of some practices that became widespread in this industry precisely because of the difficulties that come with predicting success: two of these practices are the acquisition, by major labels, of small labels that dedicate themselves to specific musical genres, and the simultaneous investment on numerous artists in the hope that the massive success of one of them will be profitable enough to cover the losses in all the other investments. Similarly, he considers it a matter of luck

to release the right technology at the right place or time, as superior technology can flop because of an untimely release.

The in-depth description of the reasons for the success of different artists in different genres, such as country (Garth Brooks), pop (Taylor Swift), hip-hop (Drake), rock (Paul McCartney) and heavy metal (Korn), is enriching and the interviews with lawyers, managers and other agents linked to these figures allow Krueger to obtain privileged information — an effective way to overcome his seeming lack of familiarity with musicological studies focused on popular music. Figures with an enormous impact in different fields of the social sciences, from Dick Hebdige, with his remarkable study of musical subcultures in the 1970s, to Sarah Thornton, who, inspired by Bourdieu, proposes the concept of subcultural capital in the 1990s to highlight the social value of different musical experiences, are not mentioned by Krueger, and their influence does not seem to be present. As for the more strictly economic field, Krueger tries not to assume deep knowledge on the part of the target audience of this work, going back to Adam Smith to explain basic concepts, but the absence of references to economists who have studied the social aspects of music, such as Jacques Attali, does not go unnoticed either. In the 1970s, Attali had already suggested that changes in musical practices have foreshadowed socio-economic changes in the decades prior to the expansion of mercantilism, of capitalism, and, possibly, of an eventual post-capitalist era, in which music would no longer be seen as a commodity and its social role would be (re)valued before the same happens with other economic activities. Although the trains of thought differ, and there is a contrast between the macro and microeconomic levels, it would be fitting to engage with one of the most remarkable music-related works written by an economist. However, this and other omissions are mitigated by Krueger's ability to show the role of behavioural economics in studying a universe that is strongly shaped by emotions. The author's interest in the question of subjective well-being is evident, as one would expect from someone who, in recent years, has co-authored several papers with Daniel Kahneman, an illustrious name in this field (see, for example, Krueger et al., 2009).

Although Krueger focuses on the American music industry, the hegemony of American popular music favours his reflections, since not only are the artists he refers to widely known, but the way the music industry works is, with rare exceptions, similar across Western countries. Comparing data on the global market in 2019 published by the International Federation of the Phonographic Industry (2020) with Portuguese data released jointly by the Associação para a Gestão e Distribuição de Direitos and the Associação Fonográfica Portuguesa (2020), we can observe that, on the whole, the same trends emerge: growth in the music industry's total revenue over the last few years; downturn in physical format sales, albeit with a rise in vinyl sales; general growth in revenue from performing rights (the drop from 2018 to 2019 globally was due to very circumstantial adjustments); and a digital market that, despite the decline in digital downloads, already represents more than half of sales revenue and has been steadily expanding thanks to streaming platforms. The global influence of the English language becomes visible in different ways depending on the indicators used: among the best-selling physical

albums and the most popular artists on streaming platforms, punk rockers Xutos & Pontapés and rapper Plutónio resort to the Portuguese language in their anglophone musical styles; and among the 10 most listened to songs on the radio in Portugal, all of them are sung in English, nine of them by anglophone artists.

The disruption caused by the COVID-19 pandemic, which began a few months after the book was originally published, may even reinforce the author's arguments, considering how the pandemic finally broke the upward trend in performative rights revenues throughout the 21st century (largely due to countless concerts and festivals being suspended), how it unpredictably impacted the success of bands or artists, or even how the interruption of cultural life has had huge social and psychological consequences.

Strictly speaking, *Rockonomics* is not a science communication book, but it allows a wide audience to understand the complex economic processes that drive the music industry. It will be of limited interest to scholars of popular music who study it in its more musicological aspect. However, the overall quality of Krueger's writing, coupled with his reputation, may motivate greater interest in the music industry by the public (this is an explicit goal, as Krueger says that talking about economics through music industry stories could be an effective way to share economics lessons), by economists, and by sociologists. Many economists' lack of interest is due, at least in part, to the relatively small size of the music industry compared to the world's largest industries. The various externalities and spillovers of this industry (from the development of small villages that host festivals to increased work productivity or emotional well-being) suggest that the study of music from a financial perspective will always be incomplete. More comprehensive approaches will be needed to qualitatively assess the weight of the music industry in modern society.

Translation: Daniel Morgado Sampaio

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Biographical Note

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