

**The Journalist as Neoliberal Lone Wolf:
On Mexico's Imaginary Reporters and
Collaborative Resistance in a Divided Guild**

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This thesis is submitted for the degree of
Doctor of Philosophy

Churchill College

30 November 2021

Preface

I hereby declare that this thesis is the result of my own work and includes nothing which is the outcome of work done in collaboration except as declared in the preface and specified in the text.

I further state that no substantial part of my thesis has already been submitted, or, is being concurrently submitted for any such degree, diploma or other qualification at the University of Cambridge or any other University or similar institution except as declared in the Preface and specified in the text.

It does not exceed the prescribed word limit for the Sociology Degree Committee.

Rodrigo D. Arteaga Rojas

2021

Abstract

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Rodrigo Daniel Arteaga Rojas

This thesis is about the subtle ways in which discourses on the individual professionalisation of journalists have been fetishised and used since the neoliberal turn to narrow international debates on imbalances in global flows of information and communication; prevent reform of increasingly inegalitarian media systems, and more importantly to dismantle organised resistance and politically divide reporters.

The study focuses on how, under the liberal theory of press freedom, journalists publicly talk and think about themselves as “lone wolves” – depoliticised and objective professionals, ideally segregated from lay society, fiercely competitive and insular in their knowledge and authority. This dissertation is the first systematic analysis of “lone wolf” discursive practices in the journalistic world and it addresses the following questions: where and how was this discourse created and enforced historically as a benchmark of professionalism? What are the political uses and epistemic blinders of this neoliberal professional gaze? Does the “lone wolf” discourse ignore or distort important parts of everyday journalistic practice? What are the limitations and lessons to be learnt from instances in the Global South in which journalistic networks and practices have tried to resist the “lone wolf” worldview?

I employ historical sociology to show how this professionalisation project was articulated by the North Atlantic coalition of neoliberal governments and the Western media industry, which aggressively opposed the New International Information Order and UNESCO's MacBride Report. I use the case of Mexico to analyse how this project and discourse was adapted in the Global South, in particular how the Mexican media system and journalism pass from being regarded as a Latin American hub for a “new world order” in the 1970s to being presented by Anglo-centric scholarship as a textbook example of press liberalisation and so-called “media opening” (*apertura*) in the 1990s-2000s.

Drawing on over 53 qualitative semi-structured interviews with 39 practitioners and ten months of multisited ethnographic fieldwork, I argue, using Beckerian network analysis, that the neoliberal professional gaze (epitomised in the ideal subject of the “lone wolf”) obscures and makes taboo half of the journalistic world, full of overlapping practices with other occupations and realms of expertise, liminal interspaces and efforts at cooperation, collaboration, and reciprocity in and outside the guild. In the empirical chapters I analyse three Mexican collaborative networks built around *Méxicoleaks*, the Panama Papers and La Estafa Maestra. This study shows how journalists are beginning to realise that in order to get the work done, build trust, and survive against new

threats and risks, journalism needs support from allies: activists, auditors, lawyers, fiscal experts, programmers, academics, to name just a few. Furthermore, I demonstrate how these alliances transcend mere survival tactics or the discursive techno-optimism behind a new era of radical sharing. In order to gradually start creating new conventions oriented towards collegiality and solidarity, these collaborations rely on conceptual and material exchanges of knowledge, practice, and technologies (notably databases and other digital tools), among nascent networks of expertise. Using the case of the journalistic world, I argue more broadly that in order to fully understand practices of collaboration and interdisciplinarity among institutions of knowledge and cultural production, we need a paradigm shift from a sociology of professions to a sociology of networked expertise. To this end, my work draws together new trends in scholarship from the sociology of expertise, science and technology studies, and de-Westernised media studies.

Acknowledgements

In a nutshell, the whole point of this thesis could be summed up in the realisation that knowledge and culture are not produced thanks to the mystique and genius of anointed giants of thought and creation, but that it takes a village of different people doing things together, doing things for each other, trusting, cooperating. I have always liked the acknowledgements sections of books because in the current “nightmarish jungle” of competition and productivity they are among the last instances where conventionally we have to sit down and *asincerarnos* about the many ways “this work would not have been possible without the generosity of...”. Here are my many debts to my village.

First and foremost, I owe thanks to the public funding and public universities of my home country, Mexico. I found the soul and passion necessary to go through the PhD in my undergrad years at El Colegio de México and, for the past years, I have lived in Cambridge without worrying too much about money or tuition fees (impossible to self-fund for someone like me) thanks to the scholarship from Mexico’s National Council of Science and Technology (CONACYT) and the Cambridge Trust.

Cambridge was my first experience in a privatised and “big league” university, and it has been a very pedagogic experience, although not always for good reasons. The University has taught me first-hand many of the things that are wrong in academia today: how resilient neoliberal, colonial, and patriarchal institutions can be to change, and how reliant the famous Cambridge supervision teaching system is on casualisation and exploitation of workers.

However, I also found critical and reflexive classmates, friends, and colleagues to share that “icky feeling” and try to name it and pin it down using the social sciences. Ironically, this had the effect of pushing me to seek concepts in critical and decolonial theories, and towards activism. This is to say that I understand my country’s public support and elite privilege as a lifelong responsibility of finding ways to defend and strengthen *lo público* – an endeavour to which this text is a contribution.

In the quest of writing this thesis, I would like to thank my supervisor, Ella McPherson, for all her guidance, helpful feedback, practical advice, encouragement, care, and support – especially when coping with bureaucratic reticence in my applications for extensions and hardship funds during the COVID-19 pandemic. I also take with me some of Ella’s valuable lessons outside the classroom: standing together on the picket line, organising teach-ins, and attending fieldtrips to newsrooms and art installations, carpool supervisions and the launch events of initiatives at the CGHR.

I also wish to thank my examiners, Natalie Fenton and Mónica Moreno Figueroa, for their time and attention to this work.

In planning my fieldwork Mónica Moreno Figueroa and Hettie Malcomson gave me good advice for designing my monitoring and security protocols, and Marco Caballero and Laura Solis taught me everything I know about digital information security. Liliana Chávez was very kind in sharing some of her contacts and giving me an induction to who was who in the Mexican journalistic world, when I was nervous about not knowing anyone.

My fieldwork in Mexico would not have been as exciting or prolific without the institutional support of the Centre for Economic Research and Teaching (CIDE), where I was a Research Fellow. In particular, I owe much to Periodismo CIDE and the generosity, carpool brainstorming, and intellectual connection of Carlos Bravo Regidor, whose friendship and insights were one of the most satisfying bonuses of my time in Mexico. Also, Grisel Salazar very kindly gave me the opportunity to present an early draft of my empirical chapters in the Prensa y Poder seminar, which proved to be an excellent sounding board of colleagues and experts who greatly facilitated my

research. My most sincere gratitude to my classmates from the Masters in Public Policy Journalism (2017-18), as their friendly and open disposition to chatting about journalism and sharing their experiences helped me fit into their world. Thanks also to the Periodismo CIDE professors, who included me in their courses and enabled me to see and reflect on my own academic position. In particular, I would like to thank Homero Campa for his friendship, generosity, advice, car lifts, and anecdotes over *tacos de guisado*.

At various points of this research, I shared early drafts and ideas with Fernando Escalante Gonzalbo, whose advice and conversations since my undergrad years have proven full of insights. With my title's "imaginary reporters" I purposefully invoke Fernando's "imaginary citizens" as a tribute to the influence *Ciudadanos Imaginarios* has had on my understanding of politics, and to the incisive research agenda that, almost thirty years after its publication, it continues to offer.

I would also like to thank Patrick Timmons, whose ideas and critique were some of the most lucid readings on the dire state of Mexican journalism and human rights, and a reminder of the need for political organisation from below, and not only symbolic but legal victories.

Irving Huerta and Ayala Panievsky became my PhD mates, colleagues, and interlocutors, with whom I have had real intellectual discussions and mutual support. I am all up for continuing our conversations and collaborating in future. I must also thank them for exposing me to the vibrant Goldsmiths tradition of media, communications, and cultural studies, the CIJ summer conferences and the Media Reform Coalition.

In the Department of Sociology at the University of Cambridge, my sincere gratitude goes to Darin Weinberg for taking the time to guide us, the PhDs, in the writing-up seminar and finding engaging ways to comment on our texts with his ethnographic knack and revealing anecdotes – and also for taking the discussion to the Mill. Many thanks to my PhD cohort – Arsenii Khitrov, Olga Zeveleva, Valentina Ausserladscheider, Liran Morav, and Daniel Tanis – for their support, confidence, and friendship, which made the whole quest more enjoyable and stimulating.

Of course, I cannot thank enough the Mexican journalists who speak throughout this text and who agreed to share their lives with me. I am mostly indebted to them. Their reactions to the study are the ones I value and am looking forward to engaging with most. They will be the ones to tell if I have managed to understand something of value here.

Finally, I would like to thank my family for their love, support, and understanding. Special thanks to my mum who, on an everyday basis, sent me tips for relevant material for this research: news clips, videos, conferences, and articles about journalism in Mexico. Together with my dad, Ale and Pepe, we discussed this material in our conversations, which pushed me to keep engaging with current Mexican journalism under AMLO's 4T. I am immensely grateful to my partner Sarah Abel, who supported me financially during the pandemic, and *por sacarme a pasear* in this drizzly but delightful isle. Her encouragement, editing, and proofreading were crucial to this thesis getting finished. Thanks also to Eleazar for that pure inspiration, and for helping me put things in perspective in the last stretch.

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INTRODUCTION

It is 23rd May 2017, and a unique emergency meeting is taking place at Centro Horizontal in Mexico City. Under the #AgendaDePeriodistas initiative (Journalists' Agenda, henceforth Agenda), 60 Mexican journalists and freedom of expression advocates from 60 media outlets and organisations are gathered together because Javier Valdez, the renowned Sinaloa correspondent and co-founder of *Ríodoce*, was shot dead a week ago in Culiacán. The room is charged with the mutual apprehension of violence breaching a new threshold and demolishing the last assurance of the capital's journalistic elite: the belief that high-profile, award-winning journalists like Valdez were relatively safe from lethal anti-press attacks. For the initiative to have gathered this kind of momentum, and for the different cohorts and factions of Mexico's journalistic world to have reacted and positioned themselves publicly on the matter, is quite out of the ordinary: this is something that has only happened a handful of times in the recent history of Mexico, despite the fact that hundreds of Mexican journalists have been killed, disappeared, and attacked in the past decades.¹

On the day of Valdez' assassination hundreds gathered to protest outside the Ministry of the Interior (SEGOB) while a group of around 28 media outlets (mostly small digital or regional branches) went on a one-day strike under the hashtag #UnDíaSinPeriodismo (A Day Without Journalism), and some print newspapers chose to publish all-black front pages with Valdez' silhouette. Ten days later, Mexican media barons from television, radio, and print conglomerates (often referred to in the trade as the "traditional media" like *El Universal*, *Reforma*, *TvAzteca*, *UnoTv*, *OEM*, *MVS Radio*, among others) will publish a succinct joint statement, #BastaYa (Enough Is Enough) (El Universal 2017) condemning violence and calling for a series of forums and panels, parallel to those organised by Agenda, to address the issue of anti-press attacks. As has been customary for many decades, the US-based Inter American Press Association (IAPA-SIP) – the media owners' association which groups together the top Latin American media moguls – will endorse this protocolary statement (Sociedad Interamericana de Prensa 2017) which conveniently

¹ The magnitude of anti-press violence in Mexico is difficult to measure due to the lack of a standardized definition of who counts as a journalist and what counts as a motive in order for such violence to be considered press related. The best data available comes from the regional branches of international human rights and press freedom NGOs with access to the field and long experience of advocacy for the safety of journalists in Mexico. For instance, according to the Committee to Protect Journalists (2022), 145 journalists and media workers have been killed in Mexico between 1992 and April 2022. Similarly, Article 19 (2022) has documented 153 journalists killed in relation to their informative work since the year 2000. Official data are only available from 2010, when the Special Prosecutor's Office for Crimes against Freedom of Expression (FEADLE) was created. However, FEADLE has been widely criticised for dismissing most of the charges as non-press related, thus promoting impunity, and for only having processed 28 court rulings out of 1,469 reported crimes from 2010 to 2021 (Fiscalía Especial 2021).

omits any mention of the role of precarity and exploitation in the vulnerability and safety of media workers. Apart from dividing from the guild's agenda in two right from the outset, the BastaYa proposal will turn out to be inconsequential, for the promised conferences will never materialise. Nevertheless, this collective response infuses the first Agenda meeting with some hope, as well as the energy that only tragedy can summon: a common calling for rank-and-file reporters to organise from below, to protest, to protect themselves.

The meeting begins with an emotive message, livestreamed on a big screen, from Valdez' *Ríodoce* colleagues, who call for justice and unity among journalists, and symbolically pass the torch to their colleagues in Mexico City to begin the discussion. With high expectations, the floor is now open, and the very first question of the day reveals the deep tensions and cracks in the guild's unity. The subdirector of *El Universal* raises his hand and says that "this might sound strange" or like "an unpleasant remark", and "of course I don't mean that anyone has to be excluded", but "who can we count as a journalist?", "who are we willing to protect?" He starts questioning whether such-and-such are true journalists or if "someone with a blog or a newsroom copywriter, who doesn't go out into the streets" should count.² These "strange and unpleasant" questions create unrest, people shake their heads and whisper in each other's ears. And so, the deliberation opens with exclusion, weakening solidarity. A year on from this meeting, Agenda would dissolve, its ideas and demands becoming vestiges scattered on the internet, its initial hope and impressive convening energy³ languishing and turning into frustration and resentment. Since collective action and political pressure for structural change seemed impossible, after Valdez and Agenda, the guild's problems went back to being discussed in individual terms: as one young reporter later told me, it was once again a case of each journalist "scratching their own back" (*rascarse con sus propias uñas*).⁴ From collective indignation and hope, reporters went back the daily grind and the normalised idea that the guild's fragmentation and society's indifference towards its journalists were simply the natural state of things in Mexico. And at the core of this division, a peculiar discourse of professionalism and professional boundaries was getting in the way, trapping any conversation within the binaries of who did or didn't count as "us" – the "real" journalists, the few true professionals – and therefore who was worthy of protection or could be left behind, even in these dire and violent times.

² The meeting was livestreamed by Agenda and is accessible at:

<https://www.youtube.com/watch?v=gTCmGAIbnr8&t=33s>.

³ In mid-June 2017, over four hundred journalists from 20 Mexican states answered the call to discuss a common diagnosis and draft their basic demands in an unprecedented and intense three-day workshop.

⁴ Literally "to scratch oneself with one's own fingernails". Fieldnotes 23rd October 2018.

But how could this be? How can professionalism be a source of division and demobilisation for journalists themselves? After all, the dominant theories in media and journalism studies and the sociology of professions all assume professionalism to be ultimately beneficial and empowering for journalists, either as an adherence to vocational mandates or as an occupational strategy for gaining status, resources, and power over a social task. Even huge international comparative survey projects like Worlds of Journalism, while acknowledging that professionalism, professional identities, and roles can vary and mean different things around the world, still insist that “however defined”, the fundamental question “each society has to answer in its own terms” is “to what extent journalists meet the highest standards of professionalism” (Hanitzsch and Örnebring 2019:118). Moreover, globally, the discourse of the professionalisation of journalists – the process of achieving the status of profession(al) – has become one of the main developmental goals for the media industry, cited in multilateral forums and freedom of the press advocacy. For decades now, it has materialised in a particular type of international aid that focuses on training and improving the skills, innovation, ethics, and resilience of individual journalists.⁵

Of course, this contemporary fetishism of professionalism is not exclusive to the journalistic world; in fact, as I argue in this dissertation, it is a part of broader historical transformations and macro forces, namely the neoliberal turn and neocolonialism. There is a longstanding aura of progress and civilisation attached to the idea of the authoritative professions – so much so that it is part of modern common sense that the more “professional” an occupation becomes, the better for its practitioners and for society as a whole. As critical scholarship has shown, in Mexican public opinion, as in other parts of the world, it is a recurrent trope to hear politicians on the right and left referring to “professionalisation” as a recipe for almost all ills that worry the land. Fernando Escalante (2021) has pointed out how professionalising and purging the local police while at the same time deploying a “genuine” profession like the military, with a solid *esprit de corps* and sense of patriotism, has been the preferred policy of the past three administrations for tackling (without great effectiveness) Mexico’s rising violence and insecurity. Similarly, studies have shown that this impetus to professionalise and control once and for all the deceitful public officials or over-politicised schoolteachers lies behind the design of controversial corruption

⁵ To mention a few notable examples: as an outcome of the World Summit on the Information Society (WSIS) organised by United Nations and held in Geneva and Tunis, action line 24(d) concerning the media stated the goal of “encourag[ing] media professionals in developed countries to establish partnerships and networks with the media in developing ones, especially in the field of training” (WSIS 2003), as well as the need to reaffirm “the highest ethical and professional standards” and “the development of human skills” for media workers (WSIS 2005). In 2008, UNESCO created the Media Development Indicators (MDIs) which identified “professional capacity building” of media workers as one of five major areas. Following this international framework, similar development goals can be found in USAID’s support programmes in the Americas “to strengthen journalist professionalism”, and under the Open Society Foundation’s “Journalism” area.

indexes, Civil Service Reforms (Azuela 2006) as well as the latest –and highly conflictive – Education Reform (Gil Antón 2018). The allure of these solutions is politically understandable. As a policy nowadays, “to professionalise” is relatively easy, cheap and, more importantly, does not require major political costs to implement. It often involves juicy contracts for state-of-the-art tech and equipment, private consultant workshops and (re)training for practitioners, as well as managerial control systems to scrupulously monitor the latter’s personal performance and trustworthiness (from “productivity incentives” to polygraphs). It is a classic case of technocratic narrowness, a culture of blame and mistrust in practitioners and a savvy strategy of changing all things individual so that everything structural may remain the same.

Furthermore, as I illustrate and argue extensively in this dissertation, what these theoretical and policy approaches fail to recognise is that the power to define and label *which* behaviours fall into the category of “highest standards” versus that of “unprofessional deviance” is unequally and disproportionately distributed within the journalistic world. Moreover, I argue that far from being an innocent, autonomous, and self-contained value system defined only by peers, professional norms are also created, shaped, and embedded historically in wider forces of change. In fact, as I document in this study, professionalism has been used geopolitically by powerful actors to circumscribe international debates about imbalances in global flows of information and communication, prevent reforms of increasingly inegalitarian media systems, and, more importantly, reinforce a subtle and smooth domination over practitioners by severing their political agency. This dissertation is a study of how neoliberalism has shaped the professional “discursive practices” of Mexican journalists to such an extent that it *gets in the way* of their solidarity, collaboration, and survival. This is a first attempt to denaturalise and explain the fragmentation and loneliness experienced by Mexican journalists in recent years not as a culturally determined state, but as a deliberate and orchestrated project imposed from above and resisted from below.

Following the lead of my research participants, I argue that the cognitive liberation needed to denaturalise the hegemony of professional discourse lies in the way that independent journalistic elites manifest a malaise with and “resented loneliness” in the professional binaries that create boundaries and walls between them and lay society, and divisive competition among colleagues. How can one do things right professionally and still end up alone, without social trust and support? In turn, journalists identify this lack of society’s support and guild unity as something that prevents them from improving their work, wellbeing, and protection in a violent context and a precarious and inegalitarian media system.

I have found that a way to expand this cognitive liberation is to explore the way in which journalists often think and speak publicly of themselves as “lone wolves” – depoliticised, detached,

and objective professionals, ideally segregated from lay society, fiercely competitive and insular in their knowledge and authority. Thus, this thesis aims to problematise and think critically about the professionalisation and professionalism of journalists by studying how these discursive practices construct ideal-subjects or “imaginary reporters”, which embody the individualistic, private, and depoliticised neoliberal interpretation of professionalism. To do so, it addresses the following questions: where and how was this discourse created and enforced historically as a benchmark of journalism? What are the political uses and epistemic blinders of this neoliberal professional gaze? What effects and consequences does the “lone wolf” discourse have for everyday journalistic practice? And what are the limitations and lessons to be learnt from instances in the Global South in which journalistic networks of expertise and collaborative practices have tried to resist the “lone wolf” worldview?

To answer this question, the thesis opens with theoretical and methodological considerations about the gap between professional discourse and journalistic practice in the initial chapters, before progressing to an analysis of the empirical data gathered for this study in the later chapters. In Chapter 1 I discuss the theoretical framework employed in the study, and in Chapter 2 argue the analytical convenience of using historical sociology and ethnographic extended case methods. I then offer, in Chapter 3, an introduction to the historical construction of neoliberal professionalisation discourse and analyse its key elements and its adaptation to the context of the Mexican media “opening”. I present the results of my empirical research in Chapters 4, and 5, progressing from an in-depth analysis of the social relations involved in cooperation between competitive colleagues in Chapter 4, to the cooperation of journalists with outsiders to their profession in Chapter 5.

Chapter 1 provides an overview of the analytical leverage of moving from a sociology of professions to a sociology of networks. I identify and critique the main dilemmas of using profession/alism/alisation as analytical concepts for the study of cultural production, namely: the problems of particularism, vocation, attribution, and bounded jurisdictions. I make the case that transcending these analytical hurdles requires reframing professions and professional norms not as descriptive categories, but as “discursive practices”: in other words, political tools historically constructed not only by peers and following the self-interest of members, but also shaped and influenced by powerful actors and therefore embedded in power relations. Furthermore, following Howard Becker’s (1982) interactionist network analysis, I make the case that looking at journalistic practice through the lens of collective action, cooperation, and interdependence affords us (practitioners and researchers) greater sensitivity to and awareness of the contradictions and gaps between discourse and reality, between professional ideal-subjects and real-life challenges. Moreover, I argue that without a sociological understanding of the collective dimension of practice

– namely, the social relations and arrangements that must be in place to foster trust and new conventions – cooperation among networks can be discursively encouraged (as in the case of the enthusiasm for a new collaborative era of radical sharing) yet remain artificial and ineffective if imposed from above.

Methodologically, I use qualitative methods – namely historical sociology and ethnographic extended case methods – to bring power and history back into the narrative, placing them at the centre of my analysis. In Chapter 3, I draw on interpretative historical sociology to analyse and critically reconstruct the roots and origins of the contemporary discourse on the professionalisation of Mexican journalists, which I trace back to what is known as the Mexican “media opening” or *apertura* model in the context of the country’s 1990s neoliberal reforms and “transition to democracy” scholarship. In the aims of denaturalising the neoliberal assumptions of these theories, in my research I have looked genealogically for counterhegemonic discourses and instances of resistance, which in turn led me to the major international Cold War controversy around the UNESCO’s MacBride Report and the new international information order (NIIO) promoted by the Non-Aligned Movement – a key historic event which has so far remained understudied in connection with professional discourse formation and hegemony. Through extensive documentary research, I show how this call from the Third World for global egalitarian media reform and the protection and responsibility of journalists was aggressively opposed in the 1970-80s by the North Atlantic coalition of neoliberal governments and the Western media industry, who articulated and used a “professionalisation project” to prevent any public regulation of the market, making professionalisation of individual journalists the only “neutral” intervention and development goal compatible with Western values of freedom and democracy.

I argue that, when viewed through the lens of broad historical patterns and macro forces like neoliberalism and neocolonialism, the Mexican *apertura* model – until now the dominant explanation on the subject – not only reproduces key elements of the neoliberal “professionalisation project” and is in urgent need of revision and theoretical reelaboration, but more importantly has reinforced characterisations of media capitalists as change agents for democracy, unregulated markets as forces of freedom, and Mexican journalists as culturally backwards, showing a hybrid and premodern professional norms or incomplete and stagnant levels of professionalism, thus enabling extra-journalistic forces to capture news production.

This thesis offers a first step in an alternative direction. I situate the Mexican case simultaneously as embedded in and resistant to the effects of wider global transformations. I show that the neoliberal professionalisation project has managed to sponsor a vanguard of elite journalists and its own “investigative boom” from 2014 onwards, when Mexican journalism has become renowned regionally and internationally for producing investigative pieces or “special

assignments” (*especiales* in Spanish), which, according to the Watergate mythology, constitute the benchmark of journalistic professionalism by Western and liberal standards. Interestingly enough, journalists involved in these special assignments have also very actively and vocally renounced the “era of the lone wolf” by mobilising another kind of epic, which revolves around the discourse of “radical sharing” and “collaborative journalism”. Faced with new threats and pushed to find solutions to get the work done, practices clash with professional discourse, and yet publicly these actors’ enthusiasm for “investigative and collaborative journalism” reproduces some of the discursive techno-optimism and altruistic openness that is characteristic of the information society and the digital revolution – an enthusiasm that I qualify in the final two empirical chapters.

A second insight I explore in this dissertation is the fact that, despite the great influence of the United States and the hegemony of neoliberal professional discourses, Mexican journalists have been pushed to work, adapt, and survive in contexts of extreme anti-press violence. Calibrating these threats and risks, in turn, has given way to instances where journalists resisted behaving like “lone wolves” or disrupted the boundaries and exclusions of professional discourse. In fact, as I embarked on fieldwork, nascent solidarity networks and self-protection initiatives like Agenda de Periodistas were emerging (albeit not without difficulties and division) and journalists in Mexico seemed to be finding different instances where they had to cooperate and collaborate with competitor-colleagues (Tunstall 1971) and establish alliances with outsiders to the profession.

Drawing on 53 qualitative semi-structured interviews with 39 practitioners and over 10 months of ethnographic fieldwork in Mexico City, I use extended case methods to analyse these “anomalous” instances of solidarity and collaboration, namely situations in which journalistic networks of expertise have managed to work together, build, and sustain relations of trust, cooperation, and reciprocity among journalists from different media outlets, as well as with members of other occupations, like auditors, lawyers, fiscal experts, programmers, and academics, among others. I employ Beckerian interactionist analysis of networks of cultural production to point to the gap between professional discourse and everyday reporting practice: between ideals and real life-challenges. My findings show that, in practice, journalists can behave “unconventionally” and escape the professional binaries of competition, exclusion, and insulation. This is not because they have extraordinary altruistic values, civic predispositions, or a “collaborative” identity, but because, sociologically, their reporting itself is a more interdependent process than we have come to imagine. In fact, as my data show, these “special assignments” required more than authoritative and autonomous professionals working in solitude: the cooperation of an entire network of (journalistic and non-journalistic) actors was needed to get the work done.

In Chapter 4, I analyse and compare how the Mexican journalists involved in the Méxicoleaks and Panama Papers projects were pushed to develop new working conventions with their direct journalistic competitors. Contrary to the global discourse of a new era of collaborative “radical sharing”, exchange and cooperation between Mexican journalists was cautious, gradual, and negotiated in a process of trial and error. Moreover, I show that even though some of the same journalists were key participants in both projects, the two networks achieved different degrees of collaboration. The Panama Papers experience – renowned for the International Consortium of Investigative Journalists’ ample resources, central coordination, non-exclusivity, and publishing embargos – did not trigger robust collaboration, but rather counterproductive competition in its Mexican branch. In contrast, Méxicoleaks – a whistleblowing platform promoted by two non-profits based in the Netherlands and Iceland (Free Press Unlimited and Associated Whistleblowing Press) – was originally designed to sponsor competition among journalists but was reappropriated by Mexican reporters into a more flexible and cooperative network. This in turn helped journalists avoid making mistakes or duplicating work, while gathering a common pool of resources. Also, as key nodes and brokers in the network, the reporters were empowered to mediate between the potentially conflictive positions of their media outlets’ editors.

In the second empirical chapter, I study the collaboration built around La Estafa Maestra, whose reporting methodology on shell or “ghost” companies was able to connect the work and “transcription devices” of different audit experts from occupations outside journalism. The chapter draws on Gil Eyal’s (2013) sociology of expertise to expand upon Becker’s network analysis by focusing on the arrangements and materiality that are needed to secure “a circuit of dialogue and exchange” among the different nodes and actors in this audit network. I show that going to the trouble of establishing hard-earned relations of trust with these professional “outsiders” not only enabled reporters to minimise the inherent risks of everyday news-making, but more interestingly it allowed them to work under a more reflexive calibration of risk, and therefore take greater risks for the sake of their story.

In Chapter 6, I elaborate an overall conclusion, which offers insights into how the fetishism of professionalisation and the dominance of the sociology of professions have produced not only political consequences, but also epistemic blinders, which obscure and distort an entire side of journalistic practice. In particular, they render invisible and make taboo all other dimensions that do not respond to the factionalism and territorial battles among professionals over autonomy and bounded jurisdictions. Based on the present case of the journalistic world, I argue more broadly that to fully understand practices of collaboration and interdisciplinarity among institutions of knowledge and cultural production, we need a paradigm shift from a sociology of professions to a sociology of networked expertise. Finally, I conclude with a message for Mexican journalists, who

I believe are at a crossroads regarding their identity as a guild and their relationship with society. In this sense my goal with this thesis is not only to denaturalise and challenge the power of neoliberal professional discourse by revising and reinterpreting the history of Mexico's "*apertura*", but to help to "articulate a politics of hope" (Fenton et al. 2020:chapter 4) and contribute to the collective construction of alternative cardinal orientations and knowledge horizons. This is crucial, particularly after the dissolution of the Agenda de Periodistas initiative, as a way out of the labyrinth of consternation and fatalism felt by my participants. If the radical vision of Non-Aligned Movement (NAM) teaches us something today, it is that to reimagine a new and more egalitarian world order from the Global South, we do not need more award-winning elites, or for reporters to merely keep on following professional standards, but rather to organise from below, think collectively, make allies, and become true political beings. Where will the social support and political energy come from to push for the necessary media reform, and a more democratic and egalitarian political economy? I argue that our best chances of answering this question collectively lie in challenging the origins and power of our benchmarks for success, and in gaining back the ability to talk about that which the Western offensive against the NAM tried so hard to unilaterally silence and make taboo: unions, corporate taxes, subsidies, public regulation, and accountability – and most importantly, a socially networked *gremio* (guild). The purpose of this thesis is to use historical and political sociology to "examine the social preconditions of politics and the politicization of the social" (Burawoy 2005:24), which such transformations entail.

1 THEORETICAL CHAPTER. FROM A SOCIOLOGY OF PROFESSIONS TO A SOCIOLOGY OF NETWORKED EXPERTISE

1.1 INTRODUCTION

In this dissertation I focus on the contemporary fetishism and political uses of professionalism after the neoliberal turn. Of course, it would be inaccurate to present these phenomena as new. In fact, as I will explore in this chapter, looking at the world through the binaries of professionals and lay society responds to an older tradition, which precedes the social transformations we nowadays englobe within the term neoliberalism, but which nevertheless is embedded in modernist ideals of individualistic creative genius and individual responsibility – ideals which, I as argue in Chapter 3, have been adapted and exploited discursively by neoliberalism.

This chapter is divided into two main parts. In the first, I identify and critique the main dilemmas of using profession/alism/alisation as analytical concepts for the study of cultural production, namely: the problems of particularism, vocation, attribution, and bounded jurisdictions. I make the case that transcending these analytical hurdles requires reframing professions and professional norms not as descriptive categories, but as “discursive practices”: in other words, political tools historically constructed not only by peers and following the self-interest of members, but also shaped and influenced by powerful actors and therefore embedded in power relations. Rethinking professionalism as a discourse is not intended to usher in a post-professional world – one where specialisation, division of labour or authority would be abolished – but rather to allow for greater theoretical awareness of the distinctions and gaps between discourse and reality, between ideal subjects and real-life challenges. I argue that the dominant professional paradigm entails analytical pathologies and epistemic blinders that ignore or distort important parts of reality, in particular, the collective and cooperative dimensions of everyday journalistic practices.

I intend to conduct this revision of the sociology of professions and professionalism in a succinct way,⁶ primarily because my goal is to move beyond the epistemic and political blindness of “profession(alisation)” as the focal point of analysis. In the second part of the chapter, I work towards developing a theoretical framework of collective action beyond professional boundaries, which allows me to explain and make visible these hidden collaborative practices through the lens of interactionist micro sociology. I use Becker’s concepts of networks and conventions to capture the interdependent and cooperative dimension behind cultural production, as well as the

⁶ For a more comprehensive revision of the vast scholarship on professionalism and where it meets with journalism, see Silvio Waisbord (2013).

“unconventional trouble” of breaking professional binaries. Moreover, I complement Becker’s analysis by mobilising Gil Eyal’s sociology of expertise, which allows me to reconstruct the social relations and the materiality of the arrangements between the different actors, devices, concepts, institutions, and spaces involved in my case studies.

1.2 THE PROFESSIONAL PARADIGM

1.2.1 PARTICULARISM AND VOCATION: THE DEPOLITICISATION OF PROFESSING LOVE

Historically, the fascination with and hope placed in professions responded to an anxiety that was deeply rooted in modernity, in the transitional *entre deux* produced by the dislocations of moving from tradition and community to increasingly industrial, individualised, and socially differentiated societies. Moreover, the professional question – as an expression of the social division of labour, specialisation, and a source of social order and morality – has always been at the heart of sociology. Since the dawn of the twentieth century, there has been a constant preoccupation with the virtues and vices of behaving like and becoming a professional.

For instance, in his lectures on *Professional Ethics and Civic Morals*, Émile Durkheim saw in professions an antidote to the ills of anomie. Just as the old Roman *collegia*, mediaeval guilds, and communes played a key role in regulating and structuring social life, for Durkheim the revival of modern professions and their organisation into self-governing occupational groups was *the* “moral milieu”: a “nexus of relationships” on a par with church, family or political party, where solidarity, belonging and integrity could be entrenched in modern society (Watts Miller 2002:41). Professions were supposed to function as a second family, a second *patrie* with a strong sense of collective life and collegial support, where one could feel *pius in collegio* – a “devoted son of the guild” – and share communal morals, communal rituals and saints, communal festivities, communal relief funds, and even funerals in the guild’s communal cemetery (Durkheim 2019:94–95). Implicit in the enthusiasm projected onto members’ devotion to their profession, was the assumption that in order to serve the public properly, all professions needed the autonomy and unrestricted authority to determine their own norms, standards, and sanctions according to purely technical and expert knowledge, and insulated from any external influence (namely, money, power, or popularity).

However, at different points throughout the twentieth century, insightful social thinkers have moved against the tide and warned of the ever-present problems of particularism and responsibility this entails, which “would simply mean replacing individual egotism by corporate egotism [...and guilds] taken up entirely with holding on jealously to their privileges and exclusive rights or even with increasing them” (Durkheim 2019:74). The idea of professions as a self-

interested class, separate from and above lay society, and of autonomy as a mode of emancipation through social isolation, caught the attention of sociologists like Max Weber. In his famous vocation lectures, especially the one given in 1919 on politics, Weber warned students about the disenchantment and rationalisation of becoming a “professional”, if by professionalisation one simply understood the impersonal, pragmatic, and strict adherence to an occupational logic and its procedural standards. One’s soul and contact with society could be lost by seeking complete professional autonomy – in the present case, by doing things following “strictly journalistic interests”. Of course, the example Weber had in mind was the renowned German professional civil service, which was impeccable as a bureaucracy but which, in his eyes, amounted to an uncharismatic and leaderless “rule of the officials”, “a cabal of insiders” dispassionately and impartially “pulling the strings” (Weber 2020:205), and “guided by the herd instinct typical of ‘guilds’ everywhere” (2020:162). For Weber, the problem went deeper and far beyond the lack of professionalism (de-professionalisation) or the possibility of unprofessional behaviour – the erosion of and deviation from professional ethics or the cynical and opportunistic vices of individual practitioners – rather, it lay in professionalism itself and the lack of responsibility, in a political sense, it seemed to convey.

Weber astutely warned that the risk of depoliticisation was implicit in professionalisation, since professional ethics and honour rely on “perform[ing] duties – quoting Tacitus – *sine ira et studio*, ‘without anger or partiality’” (2020:131). For Weber, this idea of the detached “objectivity” of professionals, whose social authority depends on cultivating *a view from nowhere* (Rosen 2003, 2010) and an image of performing their tasks dutifully and impartially according to the logic/ethics of their own profession (above the political arena or personal positioning) has the effect of *transferring* responsibility towards the *means* by which duties are performed, rather than towards the ever-present need to legitimatise those duties’ *ends*. This depoliticised ethical dimension of professionalism was entirely different to the Weberian ethics of responsibility: of not transferring, but *assuming* responsibility in a truly political sense. That is to say, positioning oneself, taking sides, standing by our own convictions as political actors who “*take* real responsibility, with [their] whole soul, for the consequences of [their] actions [and] stop at some point and say: ‘Here I stand. I can do no other’” (2020:238).⁷

Similar cautionary reflections have been made regarding the perils of increasing professionalisation in cultural production and the work of intellectuals, within which journalism is often included. For instance, in his 1993 Reith Lecture, Edward Said alerted listeners to the

⁷ My italics.

“impingements of modern professionalisation”, which, for practitioners, increasingly meant becoming a specialised and compliant “expert [...] certified by the proper authorities; [who] instruct you in speaking the right language, citing the right authorities, holding down the right territory” (1996:77). For Said, the utilitarianism and particularism of professional mentality involved:

thinking of your work [in this case] as an intellectual as something you do for a living, between the hours of nine and five with one eye on the clock, and another cocked at what is considered to be proper, professional behaviour – not rocking the boat, not straying outside the accepted paradigms or limits, making yourself marketable and above all presentable, hence uncontroversial and unpolitical and “objective”. (1996:74)

Faced with these inherent dilemmas, more than once, critics of professionalism have called for the strengthening of practitioners’ conscience, passion, and vocation. For example, Said proposes a return to “amateurism”, understood not in negative terms as incompetence or the lack of professional credentials, but “literally, as an activity that is fuelled by care and affection rather than by profit and selfish, narrow specialization” (1996:82) as in *amator* (lover) or *amare* (to love). In igniting once more in the intellectual the spirit and “unrewarded conscience” of the amateur, Said saw a way of “transform[ing] the merely professional routine most of us go through into something much more lively and radical; instead of doing what one is supposed to do one can ask why one does it, who benefits from it, how can it reconnect with a personal project” (1996:83).

Similarly, Weber was careful not to argue that there was no virtue or pride in practitioners’ self-restraint and discipline. In fact, he acknowledged the importance that competent and reputable practitioners attribute to performing their duties like a “professional”: of taking it “as a point of honour to carry out [their] superior’s orders fully and competently – to do things for which [their] superior takes responsibility exactly as conscientiously as if [their] superior’s orders matched [their] own convictions. Without this discipline and self-restraint, which is in the deepest sense ethical, the whole [professional] system would fall apart” (2020:163). However, he also distinguished between professional ethics and vocation, and pointed out that the utilitarian, depoliticised, and particularistic bureaucratisation of professions could lead to disenchantment and the death of its practitioners’ vocation (their transcendental and meaningful calling, a kind of devotion) and have major sociopolitical consequences, of which the political weakness and impasse (and later fall) of the Weimar Republic serve as a harrowing reminder. Weber admired the historical endurance and permanence of the vocation of occupations like journalism, which somehow persevered, despite all the hardships, structural constraints, and temptations:

What’s surprising is not that numerous journalists have lost their way or become worse human beings, but that, despite everything, this class of people contains so many worthy and genuine human beings, more than outsiders would dream of. (2020:171)

As inspiring and insightful as these vocational calls to start repoliticising the debate on autonomy and responsibility of occupations like journalism may be, in this dissertation I argue that this reification of love and devotion is not so much a way out of the professional paradigm, as a constitutive part of its discursive power – the other half of the professional-amateur binary. Moreover, as I will show in the sections below, appeals to strengthen the vocation of practitioners are likely to remain, at best, trapped within an individualistic notion of creative genius and individual morality, and more often than not, they may be used as a “conservative technology of will” (Ahmed 2017), in which the extraordinary altruism and vocational resilience of practitioners is invoked as a way of naturalising exploitation and domination as part of the job description. After all, one of the ultimate expressions of devotion is martyrdom.

In the case of journalism (but also for teachers, medics, or social workers), on not few occasions appeals to “unrewarded conscience” and passionate vocation have been assimilated (not without certain self-pride) by professional discourse as a kind of toughness, where the job is thought to be “not for everyone – least of all for people of weak character, especially those who need a secure social position for their inner equilibrium” (Weber 2020:170). At least since the first decades of the past century, “the journalist’s life is left to sheer chance in every way and involves working under conditions that test a person’s inner fortitude like almost nothing else” (Weber 2020:170). This of course has a direct relation not only to the increasing inequality and concentration of the media’s political economy, but, as we will explore in the next section, to the fact that, historically, the power to define what professionalism entails is not equally distributed *within* the journalistic world. Rather, some actors have more labelling power *over* professional norms than others, for “in all modern states – it seems that the working journalist’s political influence is constantly on the wane while the capitalist press magnate’s, such as ‘Lord’ Northcliffe’s,⁸ is on the rise” (Weber 2020:168).

1.2.2 THE PROBLEM OF ATTRIBUTION: FROM THE SOCIOLOGIST’S PEDESTAL TO JURISDICTIONAL MARKET COMPETITION

If we are clear that a first step towards denaturalising the professional paradigm is to realise that it is not enough to ask if practitioners follow standards with enough discipline, self-restraint and procedural ethics, then, following Said and Weber, the next step is to be able to question: Who has the power to define these standards? How is this power distributed? Who benefits from it? And what other sources of collective responsibility can practitioners mobilise to legitimatise their work

⁸ This is Weber’s direct reference to the First Viscount Northcliffe (1865–1922), owner of one of the first European publishing proto-conglomerates, including titles like the *Daily Mail* and *Times* in the UK, which even then were very active propaganda publications and key anti-German and pro-war supporters.

in society? In Chapter 3, I will examine how the Western media industry, thinktanks and neoliberal governments had exerted this power and shaped the meaning of professionalism over the past 50 years. For now, though, I would like to concentrate on critically revising how dominant theories of sociology of professions have also eagerly attempted to define professionalism once and for all – and how, by actively promoting the professionalisation of practitioners as an end in itself, they have on more than one occasion failed to take stock of the broader relations of power *over* and *within* professions.

Few social scientists have obsessed over the nature of professions to the same extent as sociologists. Despite the warnings of some of the discipline’s founders about the problems of particularism and responsibility, the modernist preoccupation with the lost wholeness of the moral order in industrial societies prevailed in sociological analysis, which continued to see professions as the missing normative resource and milieu to restore it, wherein “the division and specialization of labour were not problems to be solved; they were moral solutions for a new reality” (Reitter and Wellmon 2020:34). So, moving forward in the century, and influenced by functionalism, scholarship pursue the taxonomical enterprise of defining the essential features of “true” and “successful” professions, as well as categorising and measuring the level of professionalism of different occupations.

In this quest to capture the nature of professions and find out what makes someone a true professional there was a proliferation of trait-based classifications, a myriad of typologies and attempts at normative checklists. In pursuing this, social scientists assumed that “profession” could be a descriptive and objective concept to talk about the differences between mere jobs and reputable and “genuine” occupations, often using imaginary or idealised accounts of medicine, law, or the military as benchmarks for comparison.

As Howard Becker has pointed out, this scholarly debate includes a long line of attempts that can be traced back as early as 1915 with Abraham Flexner’s six criteria for defining professions as intellectual, learned, practical, technical, strongly organised and altruistic occupations – the latter’s “professional spirit” and “unselfish devotion” being the most important to avoid the “mercenary” decay of lesser trades (Becker 1970a:88). This is a recurrent and pendular trend. Every once in a while, there is a taxonomical revival which aims to include this or that substantive skill and to come up with a definitive typology: from distinguishing between “experts” with “crude” and “subtle” skills (Dreyfus and Dreyfus 2005), to “contributory experts” and lesser “interactional” ones (Collins and Evans 2007:35; Reich 2012).

In the case of journalism, the inherent consequence of following this approach is that it typically leads to the conclusion that journalism is “unfit”, “weak”, “undeveloped”, “failed”, pre-, quasi-, proto- or near-professional, a “profession in progress”, a “field-in-the-making” (for a

summary see Waisbord 2013:77–79). This normative element of trait-based labelling is so seductive that even classic figures in journalism studies have succumbed to it. For instance, compared to the idealised professional benchmarks of historians or sociologists, even scholar-journalists like Robert Park (1940) saw journalists and the news they produced as “instinctive” and “unconscious” recordings of the present, “unsystematic, intuitive knowledge or ‘common sense’” (1940:669); as “acquaintance with” rather than formal, rational, and regimented “knowledge about” (1940:672). Nor could classic ethnographies such as Jeremy Tunstall’s work (1971) resist the temptation of comparing journalism to higher forms of professional success (like medicine) and – with some disappointment, if not fatalism – concluding that, at best, journalism could aspire to be an “indeterminate and segmented” “semi-profession” (1971:69). One of the latest attempts can be found in the international megaproject Worlds of Journalism (WoJ), which ventured yet another typology, this time not to compare journalism with higher or lesser professions, but to create a “universal catalogue” of journalistic professional norms. Despite its claims towards de-Westernisation, the WoJ’s categorisation falls into a similar higher-lesser professional binary, only this time it is applied not *among* different occupations, but *within* the journalistic world. By dividing journalists into four (and mutually exclusive) global professional subgroups, their findings “objectively” conclude that the “critical-monitorial function” of the “detached watchdog” is mostly “placed at journalism’s normative core in the West” (Hanitzsch and Örnebring 2019:114–15), while the Rest, in Stuart Hall’s sense (2019), is found to be a diverse and plural bunch of populists, engaged advocates, and opportunist collaborationists with power.

My argument in this section is that all these attempts share the same problem of attribution – that is to say, the unsolved question of who has the authority and power to decide and label what is “genuine” or “imitation”; “crude” or “subtle”; “higher” or “lesser”; “detached” or “engaged”. What the proliferation of these inconclusive attempts and the lingering absence of consensus on definitions show is that the problem of attribution cannot be solved by increasing the precision and specificity of a list of traits, which in the end remains a positivistic enterprise because it “involves the sociologist in playing the normative role of deciding who is or is not an expert” or what counts as a true profession (Eyal 2013:870). And by doing so, the problem of attribution is simply transferred to the pedestal conferred upon social scientists as the ultimate classifiers, above all other occupations.

Notwithstanding the sociologist’s labelling power, in real life all sorts of occupations and practitioners aspire to, and indeed claim (as in “to profess”, from *profiteri* “to declare publicly”) the title of “professional” – from doctors, lawyers, and engineers, to nurses, social workers, and chiropractors, not to mention comedians, influencers, darts players, and even hitmen. For instance, as we will see in the controversy around the UNESCO’s MacBride report (Chapter 3), its

recommendations on professionalisation, quality, and training had the explicit goal of strengthening the social recognition of journalists so they could be “treated as [genuine] professionals” (UNESCO 1980:262). This is so because “profession” is not only an academic category, but also a folk concept, a marker of status, hence a political tool. Thus, in real life it makes sense “to profess” publicly that one’s work is no mere hobby or a job that anyone can do, and in fact all sorts of people mobilise different strategies to gain and maintain that social recognition and respectability. Everyone wants a piece of that “professional” status and uses a sort of professional-speak, although not every occupation and not all practitioners with an occupation can obtain and benefit from this claim with the same degree of social support.

1.2.2.1 Jurisdictional market competition: the struggle to achieve a monopoly over a social task

Faced with increasing anomalies and contradictions, in the 1960s–70s the professional paradigm tried to shift the power of attribution from the positivism of scholars to tropes of market competition; from the “objective” taxonomies of sociologists to the struggle for prestige and boundaries, where competing occupations fought for the monopoly over a social task and the subjective recognition of significant others, like the state, peer groups, investors, or users.

This led to an array of “jurisdictional” approaches in the sociology of professions, which made the process of professionalisation – the struggle to achieve the status of profession – its main object of study. Jurisdictional studies focused on reconstructing, case-by-case, the “life history” – the formation, affiliation, organisation, or even amalgamation – of particular groups of practitioners, and the *interprofessional battles* through which their reputation evolved, from shamans to the organised priesthood, from midwives to obstetricians.

For instance, the influential work of Andrew Abbott (1988) on professional jurisdictions ultimately focused on the process of how a stable and well-defined “proto-boundary” was established in order to successfully “yoke together” (1995:868), and bind social tasks to “a more-or-less exclusive claim”, so that “one profession’s jurisdiction preempts another’s”, producing market closure (1988:65). In the 1980s–90s this attention to competition, exclusion and the monopoly of a jurisdictions found an echo with Thomas Gieryn’s sociology of science, in particular his concept of “boundary work” (1983), which since then has proven very popular in media and journalism studies and the sociology of news. Hence the privileged attention given by these approaches to credentialing, licensing, lobbying and all other organisational and symbolic battles to construct “a social boundary that distinguishes some intellectual activities as non-science”, “amateur”, “pseudo” (Gieryn 1983:782, 792). Moreover, in the case of journalism, the latest iteration of this jurisdictional trend, influenced by Bourdieu’s field theory, can be found in the scholarship among the debates over journalists versus bloggers, youtubers, and citizen journalists,

and its renewed call (for the umpteenth time) for journalists to “strengthen claims of professional expertise, autonomy and jurisdiction” and “to redefine and strengthen boundaries and preserve a distinctive rationality” so that “the desire for the reassertion of boundaries” and the professional journalistic habitus can be reignited again globally (Waisbord 2013:224).

At best, empirical studies on “boundary work” can implicitly show glimpses of the tensions, practical impingements, and contradictions between professional discourse and reality. For example, Matthias Revers’ (2013) work shows how Albany’s (NY) state house press corps tried to balance the contradictory reputational requirements of professional detachment against the sociability and trust necessary for political sources to confide information to them, by performatively blurring and reifying professional boundaries as a means to control a difficult social relation. As useful as jurisdictional struggles may be for studying the symbolic claims and competition between practitioners (journalists, politicians, bloggers, influencers, press offices, etc.) for control over news as a social task, and newsworthiness as a social problem, these approaches fall short of solving the problem of attribution for several reasons.

Firstly, because the power to define professional boundaries is transferred not to a political arena of contingent negotiations shaped by inequalities and power asymmetries, but to a sort of competitive natural selection – the survival of the fittest – wherein what determines professional success is the exclusion of competitors, and market closure in self-contained and bounded fields. In a way, jurisdictions are seen as rare cases of aspiring to a private monopoly without disadvantages or pathologies, and – on the contrary – with a virtuous aura of sovereignty. Professions are ideally intransigent, segregated from lay society and insular in their knowledge. Moreover, by focusing on interprofessional power over sets of social tasks (on the *power of* and *power between* professions), the problems of particularism and utilitarianism remain intact.

Secondly, because even when the blurring of boundaries can be acknowledged, it is always treated as a transient and ephemeral relaxation: a strategic trade-off. For instance, under the jurisdictional lens, journalists can step beyond the boundary line on occasions in order to gather juicy information from sources, only to immediately go back into their professional fortress and man the walls through different defensive tactics: from suppressing their personal political being and manifestations of political preferences, to publishing U-turns and aggressive pieces whenever their “watchdog” title is questioned or they are perceived as being too close to partisans; not to mention cultivating an image of impartial “indomitability”: of being potentially unmerciful to everyone, where part of the job consists in being “buddy buddy” one week and “a bastard” the next; where professional pride and feelings of independence and accomplishment occur when sources complain publicly or “refuse to talk to them for the long term” (Revers 2013:49–50). Even at its culturally sensitive peak, for the jurisdictional approaches, in the end, the boundary must be

preserved at all costs, and it is implicitly assumed that success as a profession lies in demarcation: in an imaginary of bounded spaces (or fields of force under its Bourdieusian variation) and the individual maximisation of authority, within structural constraints and competition with other professions and defined fields.

As I will elaborate in further detail at the end of this chapter, that is why they fall short, as Gil Eyal has pointed out, of explaining cases of cooperation and co-production taking place in more liminal and permeable “zones of interspace and overlap” – not as a transient phase in a proto “field-in-the making”, nor as a strategic switching or boundary crossing, but as a locus in its own right, as “spaces between fields” (2015:42–44).

Moreover, “professionalisation” is assumed to be a natural, desirable and a positive outcome for practitioners: it protects them and advances their work and career. The more “professional” an occupation gets, all the better for its practitioners and for society as a whole (the “watchdog” title is preserved, in the case of journalism). There is little question over the legitimacy of these strategies – they are a means in and of themselves – and more importantly little attention is paid to the consequences that jurisdictional competition has for the performance of social tasks, nor to its consequences for trust and relations with competitors, “outsiders” and users – colleagues, sources, audiences or the general public, in the case of news – who played a passive role in the making of tasks, for:

ideally, professions do not take orders or suggestions from other fields, occupations, or professions. If external actors exert considerable influence over decisions, they undermine autonomy and the power of professions over their jurisdiction. All professions demand autonomy to develop and maintain certain norms of practice that are determined according to purely technical and expert knowledge. (Waisbord 2013:95)

1.3 PROFESSIONALISM AS DISCOURSE

So far, I have revised the dilemmas of the professional paradigm to introduce a degree of critical scepticism and denaturalise the sacralisation of professions as something inherently desirable that is thought of as an end, not only for practitioners, but for society as a whole and the performance of social tasks. I argue that we should think twice about getting behind the newest call to bring “professionalisation” to the underdeveloped world or reignite the flame of vocational sacrifice amongst practitioners. This is so because the power to define what counts as a “profession”, or what behaving as a “professional” means, is not only contested but unequally distributed, and has been used historically to reproduce domination.

Furthermore, what I have tried to convey is that in real life no occupation – not even a “genuine” profession like medicine – fulfils this jurisdictional logic, and that in fact the professional paradigm is sociologically unrealistic, because its binaries are “so divorced from reality as to be unattainable”, and in this sense professionalism can *get in the way* of everyday practice and “may

have consequences not intended by its users” (Becker 1970:102). Consequences that can become real in their effects when practitioners believe and take its metaphors seriously, for “people who accept it as a statement of ideal may become disillusioned when they discover it is so difficult to bring into reality and give up their attempts to strive for it” (Becker 1970:102). The point I am making, following Becker, and which I will explore in further detail in this section, is that preserving the image of professional virtue (the mask of depoliticised impartiality, individual self-sufficiency, and the particularistic and procedural transfer of responsibility) can be a useful public relations device *and*, simultaneously, a weak form of legitimacy for building public trust outside the profession, making it a limiting trap for getting the work done and establishing the social value of this work.

For these reasons, I propose that contemporary claims on professionalism and professionalisation – in this case in the journalistic world – can be best studied as “discursive practices” (Hall 2019:155), which in my view can help us overcome the abovementioned limitations and make visible other political uses, tensions and intersections within professionalism. I am aware that “discourse” may perhaps be seen as a broad concept and that discourse research is diverse and can be found across disciplinary affiliations and traditions from sociolinguistics, anthropology and education, to semiotics, critical discourse analysis, ethnomethodology and conversation analysis (Wetherell 2001:381). So, what do I mean by discursive practice and what is its analytical leverage for studying professionalism? First, the use I make of discourse is one that does not merely see it as language and communication, as an innocent and self-contained text to be read separately from social practices and power relations. Following Stuart Hall, seeing journalistic professionalism as a “discursive practice” requires us not only to pay attention to how a repertoire of different statements (ways of talking, writing, portraying and reacting in public) work and fit together more or less systematically and coherently to shape what counts as (un)professional, and as knowledge about journalism, but also to focus on how this discursive aspect is deeply implicated in real life and politics. In this way discourse *is* only possible in practice. This is so, because discourse “influences how ideas are put into practice and used to regulate the conduct of others” (Hall 1997b:29), for people act on that “knowledge” which is considered acceptable at a given period in time, “believing that [particular statements] are true, and so their actions have real consequences”, thus making the practice of producing meaning inseparable from power (Hall 2019:157). Unlike jurisdictional approaches, this conception of power is more web-like and is never monopolised by one class or centre (in this case, authoritative professions) not even when professions are finally “yoked together” and rigid boundaries are in place. Professional discourse is not a uniform timeless continuity fixed in history, nor is its power so totalising and vertical that it becomes irresistible and ultimately inescapable.

This is not to argue that discourse and power are equally distributed: quite the opposite. Analysing the contemporary fetishism over professionalisation as a “discursive practice” enables us to focus precisely on how intersecting inequalities and asymmetries produce conditions in which everyone’s voices and ideas are neither equally heard, nor able to regulate the conduct of others (in and outside professional boundaries). Looking at professionalism through the critical lens of discourse allows us to pay attention to the power *within* and *over* professions, and to conceive of professional norms not exclusively as the practitioner’s “desired conception of one’s work and, hence, of oneself” (Hughes 1984:339–40), but as a form of control “at a distance”: a “normative technique” “constructed and utilized as much by managers in news organizations as by journalist practitioners themselves” “to discipline workers and workforces via mechanisms of occupational identity and self-control” (Aldridge and Evetts 2003:549,555; Evetts 2014). In other words, being able to analyse how, for instance, tropes of market competition, entrepreneurship, or imperialism can become linked to discourses of professionalism requires understanding that they can also be used politically as a Trojan horse. In a nutshell, the decision to professionalise the police via polygraphs, or academics via the audit culture of the Research Excellence Framework (REF) (Brown 2015:196) should not be treated as innocent expressions of or consensual initiatives originating from the “university community” or the police workforce. It might sound obvious, but – contrary to jurisdictional particularism – journalists are not the only actors capable of generating journalistic professional norms; they are only one among many kinds of actors, with different degrees of power and institutionalisation, who have shaped discursive practices.

Thus, historically, there can be discursive practices that are hegemonic in the Gramscian sense, inasmuch they naturalise their statements, creating “deviance”, and “‘rul[ing] out’, limit[ing] and restrict[ing] other ways of talking, of conducting ourselves in relation to the topic or constructing knowledge about it” (Hall 1997b:29). However, this does not prevent unconventional practices and counterhegemonic discourses from occurring; it only makes it more difficult and costly for them to prevail. This is so because discursive practice constructs ideal “subjects” – “figures who personify the particular [attributes and] forms of knowledge which the discourse produces” (Hall 1997b:40). As we will explore in the Chapter 4 in the case of the “lone wolf” journalist and the mythology of investigative revelations, the effect of this “subject” is that anyone participating in professional-speak – including those who cannot embody the ideal or who try to challenge it in its own terms – are trapped inside its binaries because they “must position themselves as if they were the subject of the discourse” (Hall 2019:156), thus locating themselves according to the “subject-position”, meanings, and regulations of professionalism. In other words, even if practices and conducts deemed “deviant” or “unprofessional” can and indeed do take place in real life, they must deal with taboo and marginalisation, for “what is shown or seen, in representation,

can only be understood in relation to what cannot be seen, what cannot be shown” (Hall 1997a:266).

In this thesis I have decided to use the concept of discourse precisely to denaturalise the political uses of professionalism and highlight the power struggles behind it, in an effort to maintain at the forefront the fact that professional discourses have their own pathologies, which may obscure, distort or clash with crucial parts of journalistic practice, like interdependence, cooperation, inclusion, reciprocity, trust and exchange – making them anathema, a shameful taboo. Moreover, my critique is coming from a place of humility, respect, and recognition for the vocation and lived experiences of Mexican journalists, which I argue are better understood through collective action and everyday practice, rather than through the individual psychology or moral judgment of personal virtue or vice. This study will have served its purpose if its long historicisation helps reporters “*de a pié*” to question and discuss with others: where do these professional taboos come from? How were these professional ideals created and enforced historically in Mexico and elsewhere? Who can define and impose these rules and standards on others? Could it be that, in subtle ways, professionalism has been used to control the guild (*gremio*) and fragment it into its current political impasse? Yes, seeing the world through a professional lens (a professional gaze) make sense and might be a proven and safe defence mechanism, but could it also be part of the reason why, for years now, rank-and-file journalists in Mexico have had a feeling of *loneliness* at work, of being abandoned by society (especially in the midst of such violent times)?

In Chapter 3, I will reconstruct the historical process by which professional discourse and professionalisation were used in broader global debates in the 1970s to prevent media reform and perpetuate an increasingly inegalitarian political economy, as well as the key role these concepts played in the neoliberal scholarship on what is referred to as the Mexican media “opening” (*apertura*). But for now, I want to briefly explore some of the key assumptions underlying the power of professional discourse, which will guide our analysis throughout this thesis. As Becker (1970) has pointed out, the power of “profession(al)” discourse resides in the mobilisation of a series of suppositions and metaphors: 1) the idea of monopoly and abstraction: that “no one else can do this work” because of its difficult nature and esoteric body of knowledge; 2) the idea of a social mandate: that one’s work is a service of the utmost public importance and requires a code of ethics, devotion, altruism and selflessness – in sum, a “moral division of labour” (Hughes 1984:288); 3) that precisely because the task is considered so vital for society, not everyone should be allowed or even considered capable to practise it (only qualified people selected by a strictly controlled recruitment process), and so the few selected practitioners should be admired and paid handsomely; 4) that the licensing, accreditation and assessment of practitioners should be legally recognised by the state, but that ultimately government officials cannot judge or even understand

the complexity of the profession's abstract and esoteric knowledge, with the natural consequence that judgment should only be made by the members of the profession itself – represented by all sorts of organisations or disciplinary bodies (Becker 1970:94–96).

Of course, these assumptions are hardly ever fulfilled in real life, but this does not mean that the “profession(al)” symbol does not have real power and consequences. Like sanctity or heroism, very few people have been saints or heroes, yet actors have these ideals of the subject (which are never fully embodied or equally experienced) in mind as a referent and aspiration. They not only inform and guide practitioners' professional experiences but serve to justify the political economy in which these experiences are structured: from funding institutions, the promotion of certain laws and international aid programmes, to development indicators, career incentives, awards, and, conversely, stigma and sanctions for certain practices. In this sense, when I characterise the journalistic ideal-subject as a neoliberal “lone wolf”, this does not mean that this is a homogenous standpoint shared by every actor. However, the significance of studying the “lone wolf” as a discursive practice of professionalism from the journalist's own experience is that it allows us to explore the central power tensions within the journalistic world and culture, as well as the diversity of actors' responses (including resistance) to common structural challenges. This is so because in ideal-subjects we can make visible the dominant “set of ideas about the kind of work done by a real profession[al], its relations with members of other professions, the internal relations of its own members, its relations with clients and the general public, the character of its own members' motivations, and the kind of recruitment and training necessary for its perpetuation” (Becker 1970b:93).⁹

⁹ Regarding the relations between journalists and their sociocultural environment, including relations with members of other professions and sources, the classical approach would have been to use concepts from source theory which have been developed by scholars in the field of journalism and media studies. However, applying a source-centred approach did not allow me to make sense of the complexity I was observing in the field and therefore I decided against using it for several reasons. First, because it narrowed the agency of my participants to the role of passive conveyors, of a “crucial but secondary role in reproducing the definitions of those who have privileged access, as of right, to the media as ‘accredited sources’” (Hall et al. 1978: 58). According to source theory, “sources make the news” (Sigal 1986) in the sense that “frequent and reliable [news] production [can only be viable] if they establish regular channels of news gathering” (Tiffen et al. 374). This means that in general preferential access to news is granted to elites, powerful actors, and institutions with vast resources for providing journalists with “information subsidies” (Gandy 1982:8; McPherson 2016), hence allowing the latter to become “primary definers” of news (Hall et al. 1978: 58). However, as I analyse in chapter 5, what I observed in the field was the opposite of “information subsidies”. My participants did indeed consult bureaucrats, but the latter did not shorten the journalists' time and effort to get information; if anything, going into the trouble of establishing a network of expertise was more taxing for the reporters. As I elaborate in section 5.1, what I call assembling a chain of transcription – a cycle of exchange and dialogue – is a different kind of relation with expert sources: different to fishing for expert quotes and the passive reproduction of PR statements and quotes from institutional spokespersons. Moreover, the Estafa Maestra case study showed that reporters consulted elites, experts and “accredited sources” but also developed methodologies and “transcription devices” which, interestingly, helped them not merely to convey the views of “primary definers” but to rework categories and definitions by including their own observations from the field and the testimonies of victims. This empirical complexity required conceptual apparatuses more attuned to exchange, agency, and reciprocity, which could capture the negotiated character (Ericson 1989) of everyday interactions between journalists and sources: that “uneasy exchange and reliance, [where] both sides

1.4 TOWARDS A SOCIOLOGY OF NETWORKS: AN ANALYTICAL FRAMEWORK OF COLLECTIVE ACTION BEYOND PROFESSIONAL BOUNDARIES

So far, I have shown how the dilemmas of particularism, utilitarianism, and attribution are all inherent problems of what I have called the professional paradigm, which, by assuming the jurisdictional monopoly and creative and normative sovereignty of practitioners as definitional criteria, have resulted in interpretations that diagnose increasing anomalies, professional weaknesses, and moral decadence. As I have pointed out, this is so because of the irreconcilable gap between professional discourse and everyday practice: in reality, medics need to cultivate the cooperation of patients or other nonphysician scientists to even begin to understand what illness is; lay society does not behave passively nor immediately value and trust the irrefutable authority of licensed professionals; and not even the military (nor, for that matter, the state) is sovereign and able to legitimately monopolise violence (Geertz 2004; Migdal 2011), rather it has to negotiate and deal with the resistance of social protest, guerrilla, militias, and bandits. In other words, following Becker's warnings, we must never forget that the professional paradigm has its own "pathologies" (Becker 1970:102) and creates "imaginary" ideal-subjects, social representations which even members of "genuine" or "highly professionalised" occupations can only fulfil partially, and not without a difficult balancing act.

In this final section, I propose an alternative theoretical framework – namely, networks, conventions, and networked expertise – which has a greater sensibility for exploring and rendering visible practices of interdependence, negotiation, and inclusion that are often performed *sotto voce* or deemed dirty words under the professional binaries of exclusion and autonomy, but which, as I observed in my fieldwork, constitute the other half of journalistic practice. The basic idea behind the change of paradigm I am suggesting lies in challenging the illusion of separation and individual genius – that is to say, the idea that knowledge and cultural production are not individualistic, but collective enterprises and therefore only understood empirically in practice and through real-life

need each other but pursue alternative professional objectives" (Davis 2009:205). Furthermore, a top-down theory of institutionalised subordination between sources and journalists also proved limiting in the case of the Panama Papers and MéxicoLeaks, primarily because leaks were sent via encrypted platforms so that the identity of whistle-blowers remained unknown even for reporters, meaning that by definition no contact and no personal or institutional relationship was established. In my view, methodologically, these limitations of source theory come from the fact that often researchers deduce power relations not through interviews and participant observation but through content analysis of text, which is used to measure the number, frequency, and type of sources as a proxy for balance, diversity, and pluralism (Tiffen et al. 2014).

challenges, not by judging them against metaphors of closed, separate, and bounded spaces, with a particularistic logic and autonomy that goes above politics and outside of society.

I make the case that in order to capture this collective dimension of journalism we need to move from a sociology of professions to a sociology of networked expertise, to make sense not of “who has control over a task”, but of “what it takes to accomplish a task” in the way it was done, and how journalists’ work “connect[s] together [or not] actors, devices, concepts and institutional and spatial arrangements” (Eyal 2013:877). Methodologically, as I will elaborate further in Chapter 2, this requires extending theory by paying attention to “trouble cases”, allowing it to be reworked and refined “so that it includes the seemingly anomalous case” (in this case, interdependence and collaboration with competitors and professional outsiders). It requires asking “what kind of an organisation could accommodate a part like this? What would the rest of the organisation have to be like for this part to be what it is? What would the whole story have to be for this step to occur as we have seen it occur?” (Ragin and Becker 1992:212–13).

For this purpose, throughout this thesis I will use and adapt three notions – conventions, resources, and networks – articulated around Howard S. Becker’s concept of “worlds”, which he developed mainly in his work on the sociology of art, *Art Worlds* (1982). This was then expanded and refined into a model for other types of cultural production (Becker and Pessin 2006) in which we can of course include journalism and the production of news, in particular the type of news that interest us here: *especiales* or special assignments. I chose to borrow Becker’s concepts because, in my view, they help us to remember something quite simple but far from obvious: sociologically, reporting requires more than authoritative and autonomous professional reporters. In fact, as I observed in the field, “it takes a village” (in Gopnik 2015) of all sorts of people – not necessarily all journalists – “doing things together” (Becker 1986) and interacting from different material and normative positions to perform journalistic work and to produce news. In this sense, I understand the *journalistic world* as a network of people whose activities contribute collectively to “produce the kind of works [in this case the news and journalistic projects] that the *world* is noted for” and are “organised by their joint knowledge of conventional means of doing things” (Becker 1982:x). These collective activities are far from being interactions free of conflict or intense negotiation and nor do they take place as a result of goodwill or non-hierarchical, symmetrical relations. In Becker’s words, a *world* consists of:

real people who are trying to get things done, largely by getting other people to do things that will assist them in their project. [...] The resulting collective activity is something that perhaps no one wanted, but is the best everyone could get out of this situation and therefore what they all, in effect, agreed to. (in Gopnik 2015)

Contrary to more techno-optimistic definitions like Castells’ “network society” – widely criticised for overstating the inherent democratic and liberatory counterpower of ICTs and a new era of

horizontal and pluralistic “mass self-communication” (Curran et al. 2012; Fenton 2016; Mansell 2010) – the advantages of the Beckerian notion of network lie in its interactionist character (Bottero and Crossley 2011:104–5). For conventions within networks of cultural production can only be established and learnt in practice, in the course of the micropolitics of experience, through a process of negotiation and trial and error performed by “people who participate regularly in [day-to-day] activities” and who develop more or less standardised arrangements to solve common problems. Yet, even in a small network of people, these arrangements allow journalists to make the most of available and unequally distributed resources, since “decisions can be made quickly, plans can be made simply by referring to a conventional way of doing things”, so that members of the network can easily and efficiently coordinate among themselves and “devote more time to actual work” (Becker 1982:29,30,59).

Like any other theory, Becker’s and Eyal’s network analysis (implicit in their concepts of social worlds and expertise) has limitations and has been subject to criticism. There are three main arguments in this regard: a neglect of power and structural inequalities within networks, an overemphasis on collaboration and a focus on micro-interactions over macro structures. The first criticism has been articulated mainly by structural functionalist scholarship like Pierre Bourdieu’s field theory, which “rejects network analysis and symbolic interactionism because, [Bourdieu] claims, they do not distinguish *objective relations* from *social relationships* and mistake effects for causes, neglecting the underlying forces (objective relations) which generate empirical social relationships” (Bottero and Crossley 2011: 101). A similar critique of micro sociology and symbolic interactionism, as a whole, has been articulated by Marxist scholars like Michael Burawoy, who claims that the interactive “creativity of actors in social situations” is often treated as an innocent text devoid of the historical processes and power struggles through which those situations came to take place, pointing out that “one [cannot] read and interpret a text without knowing [the position of] its author or audience. [Culture as] text may appear to be autonomous, but nevertheless they have to be created, and they do produce effects” (Burawoy 1991: 279). Being aware of these theoretical limitations and the importance of bringing power and history back into my analysis, I decided to complement my theoretical framework by using historical sociology to look at social situations and the hegemonic professional discourse of the “lone wolf” through the lens of broader economic and political forces such as neoliberalism and neocoloniality. As I elaborate in chapter 3 and 4, this historical revisionism of the Global Great Media and Communication Debate and the Mexican *apertura* model allowed me to explore the concrete mechanisms and the generative role of social interactions by which journalistic practice emerged in historically and socially constrained contexts and positions, in an attempt to “shed light on how the whole social structure is present in the tiniest interactions and routines in the newsroom” (Neveu 2007, 344).

Moreover, to mitigate the overemphasis on collaboration that is attributed to interactionist network analysis (Dickson 2008: 1391), I purposefully tailored a pragmatist-oriented interview technique (see section 2.5), which helped me to explicitly ask my participants for instances not only of cooperation but also of conflict, competition, and unequal distribution of resources, both material and reputational. This methodological adaptation proved useful for incorporating into my analysis competition *and* collaboration, exclusion *and* inclusion, all at the same time. This was possible thanks to my focus on rule breaking, deviance, and professional “anomalies”, which allowed me to highlight the labelling power of dominant “conventions [which] are generally hidden to outsiders but they become obvious when things go wrong or when they are challenged” (ibid.:1395). In this sense, as Botter and Crosley have rightly pointed out, “examining the formal properties of networks allows us to explore the diffusion of practices and the distribution of conventions and resources systematically: as sets of social relationships. It foregrounds issues of power and resources through an examination of social ties in which social networks are both interpersonal connections and positional relations, of opportunity, inequality, and constraint” (2011: 106). Finally, regarding the generalisability of micro-interactions to macro-level processes and structures, I decided again to complement Becker’s and Eyal’s network analysis by employing the extended case method. Following the ECM’s deductive generalisations and its approach of extending theory out from micro situations to macro forces, I decided to carefully select anomalies or “trouble cases” (Burawoy 2009; Mills et al. 2012:2), which were analytically valuable precisely because they introduced contradictions and nuance to the way in which dominant theories of journalism and media studies have understood professional culture. This was achieved by looking for instances where journalists resisted behaving like “lone wolves” or disrupted the jurisdictional exclusion of professional discourse. Overall, these theoretical and methodological adjustments proved useful for mitigating some of the limitations of Becker’s and Eyal’s network analysis by developing concepts which are socially situated, empirically grounded, historically and contextually located, and can bridge the gap between discourse and practice, collaboration and competition, and be able to perceive both professional appearances and the messy trouble of day-to-day cooperation simultaneously.

Furthermore, Becker’s sensibility for exploring the collective dimension of networks of cultural production allows us to make visible (or conversely, strip the stigma away from) instances of interdependence, “overlap”, and cooperative “spaces between fields” – not as deviant professional anomalies but as analytical locales in their own right (Eyal and Pok 2015:42–44). Seen through this lens, resistance to professional binaries and unconventional behaviour are not merely the result of a lack of individual autonomy, but simply “more costly and difficult” to achieve for they imply being in tension between “conventional ease” and “unconventional trouble” (Becker,

1982: 34–5). As we will see in Chapters 4 and 5, journalists can simultaneously collaborate or compete (include or exclude), depending on their ability to establish and manage complex relations of trust and risk calibration, but “the nature of those relations between people it is not given *a priori*”¹⁰ (Becker and Pessin 2006:176) – journalists have to (or rather, are pushed to) go to the trouble of behaving unconventionally, establishing those arrangements, and navigating the costs of breaking with professional discourse.

However, as we will see in my case studies, the contribution of these networks goes beyond the agency of people and their structural constraints and produces something more than a sum of their resources. It relies on conceptual and material exchanges of knowledge, practice, and technologies (notably databases and other digital tools). To capture at a microlevel the complex interplay of social interactions and materiality involved in reporting and news production, I used Gil Eyal’s sociology of expertise to expand Becker’s notion of “resources” and reconstruct the arrangements and materiality that are needed to secure cooperation within a network of expertise.

Influenced by science and technology studies, Eyal has developed a framework that analyses expertise not as attribution but as “networks that link together objects, actors, techniques, devices, and institutional and spatial arrangements” and that are gradually assembled by “a certain give-and-take – exchange or dialogue – that is crucial for securing the cooperation” of all the parties involved in (re)formulating and addressing a task or problem (2013:864, 875). This has the advantage of opening up the analysis of power and the influence of expertise, not only as “restriction and exclusion, but [also as] extension and linking” (Eyal 2013:876) – an interplay which allow us to look at both sides of the coin. Therefore, this framework enables us to analytically distinguish, for instance, how under certain circumstances weakening the monopoly and autonomy of specific professionals can at the same time forge and strengthen the influence of a network of expertise, precisely because “no single node could control and appropriate the [dialogue and] exchange” (Eyal 2013:886).

I am aware that Eyal’s call for a sociology of expertise has been articulated mainly around his study of interstitial spaces such as security or economic expertise, as well as in his classic study on the arrangements and networks that made possible the shift in diagnosis and treatment from “retardation” to “the autism spectrum” in medical expertise. Nevertheless, I find it equally useful to study other forms of coproduction and collaboration in knowledge and cultural production, like journalism. So, for the purposes of this study, I will use and adapt Eyal’s concept of networks of expertise to reconstruct the arrangements between different actors, devices, concepts, institutions,

¹⁰ My translation: “La nature de ces relations entre les gens n’est pas donnée *a priori*”.

and spaces, which were necessary for the reporting of my case studies to turn out the way it did, but more importantly, for journalists to secure cooperation and connect their work within a longer “chain of transcription”, with “the ability to sum up the results of multiple [...] experiments [...] to make [its] claim for the efficacy of [its diagnosis and concepts] stronger” (Eyal 2013:864, 886).

I am also aware that “networks” is a concept with multiple meanings and may perhaps be seen as a broad concept. “Networks” and “networked” – as an epithet or attribute – have inspired a great deal of literature and their scholarly uses are diverse and can be found across disciplinary affiliations and traditions, from social network analysis (SNA) (Bottero and Crossley 2011) to Latour’s actor-network theory (ANT), not to mention the techno-optimistic scholarship on the rise of the “networked society” in the digital age (Castell 2010). A similar enthusiasm for technology has taken place in journalism studies around the concept of “networked journalism” (Jarvis 2006; Rosen 2006, 2018; Van der Haak, Parks and Castells 2012), which was coined in the 2000s around the debates on citizen journalism, blogging, and the changing gatekeeping capacities of journalists. At the time, “networked journalism” was presented as a distinctive genre of journalism and a mixed model that was less radical than the “journalism without journalists” or the “amateur hour” (Lemann 2006) promoted by advocates of citizen journalism. According to the “networked journalism” literature, journalistic judgment, values, and professionalism were not to be surrendered or challenged but merely to be adapted into some kind of “boundary crossing” (Beckett and Mansell 2008: 92). This was thought acceptable to “allow the public to be part of the production” (in Marsh 2008) through inputs, suggestions, and post-publishing feedback and discussion – and more recently through the trends of crowdsourcing, user-generated content, prosumers, citizen science, and data mining and mapping (Van der Haak, Parks and Castells 2012). Although the “networked journalism” literature claims to “recognize the complex relationships that will make news” and “take into account the collaborative nature of journalism” (Jarvis 2006), it arguably fails to do so for several reasons. First, because its use of “networks” reproduces and remains trapped in what I call the binaries of the professional paradigm, that is to say, it advocates for “professionals and amateurs working together to get the real story, linking to each other across brands and old boundaries to share facts, questions, answers, ideas, perspectives” (idem), but by doing so it falls into the reification of jurisdictional competition and hierarchies, and reproduces the dichotomies between professionals and amateurs, between bounded exclusion and inclusion, independence and dependence (see Section 1.2.2.1). Second, because its use of networks as “boundary crossing” is simply a variation of the concept of “boundary work”, which, as I have argued above, treats cooperation and coproduction not as social accomplishments nor as an inherent dimension of journalistic work, but as a merely strategic and transient relaxing of defined fields battling it out in a zero-sum game to maximise their autonomy. Third, because the

“collaborative nature of journalism” (Jarvis 2006) and the “new professional figure” embodied in the so-called “networked journalist” (Van der Haak, Parks and Castells 2012: 2927) are only thought to have emerged circa the 2000s as a result of the “technology-driven process of accelerated change” behind the digital age (ibid.: 2923). In other words, “networked journalism” is based on the problematic assumption that collaboration did not take place in the analogue past or, conversely, that it has only been possible “because of the culture and technology of the Internet [was] constructed as a platform for freedom” (Van der Haak, Parks and Castells 2012.:2934), as an open, decentralised, non-hierarchical, and diverse “space for dialogue” (Beckett and Mansell 2008: 93).

So how does my interactionist use of “networks” differentiate from other uses of the word, in particular, from “networked journalism”? What is the analytical leverage of a sociological use of networks for studying professionalism in the journalistic world? As explained above, the sociological use I have made of “networks” aims to capture the collective and collaborative dimensions of all journalistic practice and to avoid what I call the problem of attribution: the proliferation of trait-based classifications, typologies, and attempts at normative checklists. In other words, the paradigm shift from a sociology of professions to a sociology of networks of expertise, which I propose in this study, aims to understand journalism without adjectives. Rather than narrowing collaboration and interdependence into a new and niche yet prescriptive list of attributes (e.g. networked, knowledge-based, data-driven, citizen, public, civic, solution-based, interpretative – among a myriad of other inconclusive attempts), I think the question we should be asking is not whether we are entering “the era of networked journalism” (Rosen 2006) or advocating for a given model to become a “self-fulfilled prophecy” (Jarvis 2006), but rather: when has everyday journalistic practice *not* relied on this collaborative and collective dimension? The next chapters will be dedicated to this enterprise.

2 METHODOLOGY CHAPTER

2.1 INTRODUCTION

As I outlined in the Introduction to this thesis, what initially caught my eye, theoretically speaking, was what seemed to be, at the time, two “contradictory” processes or anomalies that did not quite fit into the liberal consensus about Mexico’s media opening. First, as I will explain in Chapter 3, once the initial enthusiasm for the media *apertura* declined after the 2000s, Mexican journalists were portrayed (from an Anglo-centric perspective) as showing incomplete, stagnant, low levels of professionalism. And yet the Mexican “investigative boom” – the benchmark par excellence of democratic journalism by liberal standards – was taking place as I embarked on fieldwork and was already being spoken of enthusiastically, with similar murmurings, once again, of a civic awakening.

What seemed “contradictory” was the fact that these investigations or “special assignments” (*especiales* in Spanish) were flourishing in what was described by the theory as a “captured” media system and amidst a global context dominated by narratives about the “crisis” of journalism. Second, practitioners in Mexico constantly invoked images of the isolation, division, and fragmentation of their journalistic guild, which they expressed through their feelings of “loneliness” while facing anti-press violence, and references to “lone wolf” behaviours that prevented them from working and organising collectively. Yet, at the same time, nascent solidarity networks and self-protection initiatives like Agenda de Periodistas were emerging and journalists in Mexico seemed to be finding different instances where they had to collaborate with competitor-colleagues and outsiders to the profession. All this was taking place amidst another kind of enthusiasm, which revolved around the discourse of “radical sharing” and “collaborative journalism”, which began to be actively promoted by international foundations, professional associations, and j-schools in the Global North. Notably, as I analyse in section 4.1, this enthusiasm was actively promoted around 2016 by key actors, such as the International Consortium of Investigative Journalists (ICIJ) (Walker Guevara 2016), the conference of Investigative Reporter and Editors (IRE) and Columbia Journalism School in the context of megaprojects like the Panama Papers, which, it was said, opened up a new “network model” of collaborations and closed “the era of the lone wolf” (Coronel 2016).

This chapter presents the reasons why I considered the use of ethnographic methods, in particular the extended case method, to be “the right tools for the job” to address these theoretical anomalies, and how I adapted these instruments, techniques, and strategies of data collection/analysis in relation to multiple and evolving challenges in the field. In addition, for transparency a detailed overview of the collected data and interview guides are included in the appendices. I conclude by reflecting on the ethical considerations and limitations of the study, in an effort to resist “black boxing” or presenting a “frictionless” account of my research practice. Instead, by showing the exploratory adaptations I made throughout my research, my aim is to reflect on how “friction” may be seen as a generative process.

2.2 EXTENDED CASE METHOD AND SAMPLING STRATEGY

For this dissertation I used a research strategy inspired by the extended case method (ECM), which originated in the Manchester School of Social Anthropology, namely, in Max Gluckman’s methodological situationism and processual analysis, and which was later adapted and popularised in sociology by Michael Burawoy and his work on postcolonial Zambia (Barata 2012). I found this approach useful for various reasons. First, because traditionally case studies have a particular strength in qualifying empirically the grand claims and generalisations of theories that can no longer accommodate a series of identified anomalies (Ragin and Becker 1992). As I

explained above, this was the case for what I observed in the Mexican context, where jurisdictional theories on professionalisation rendered invisible and taboo all other dimensions of solidarity and collaboration that did not respond to the spirit of competition, exclusion, insulation, and individual self-interest. Moreover, adopting the civic, competitive, and modern teleology of neoliberalism, functionalist theories on democratic transitions and media opening attributed the “underdevelopment” of the Mexican press to cultural backwardness and the lack of professionalism of media workers, which made the recent “investigative boom” a “deviation” from the so-called normality of collusion and clientelism.

Thus, these “anomalies” – instances of collaboration-solidarity and the Mexican “investigative boom” – and my dissatisfaction with the dominant theories were the North Star that guided my curiosity and inquiries during the early stages of my research, when, inevitably, my scope was relatively open and more exploratory. Following these intuitions (it was not until the final stages of my writing up that I became more self-conscious about expanding and (re)constructing theory), I deliberately planned my fieldwork and selected cases looking deductively for refutations of the theory in events and situations where the “processes of cultural production are less clean, less tidy, more happenstance, and more leaky than theorists sometimes acknowledge” (Cottle 2007:6). In this sense, this study draws on a great and diverse tradition of media ethnographies, in particular what Cottle calls “focused production-based studies”, a new wave that has “sought to realign theoretical sights in a less media-centric way” (Cottle 1998:8, 2000) by questioning and making explicit “taken-for-granted assumptions or established professional norms”, “reminding us of the contingency of cultural production” and its embeddedness in “wider forces of change” (Cottle 2007:5–6).

However, ethnography is not a panacea (after all, some of the main scholarship on the Mexican *apertura* used ethnographic techniques), nor it is close to being a homogeneous method. As Burawoy (1991a) has pointed out, different traditions of qualitative microsociology, like grounded theory or hermeneutic case studies, have different responses to the common criticisms of ethnographic methods: 1) the capacity to make generalisations based on a small number of cases; and 2) the capacity to link and move from micro situations to macro levels of analysis and historical processes. In this sense, the advantages of using the ECM for this study are as follows. First, I used the method to observe situations of *societal significance* and not of statistical representativity. This means that generalisations can be made to the extent that “every negative case becomes an opportunity to refine the result, to rework the explanation so that it includes the seemingly anomalous case” (Ragin and Becker 1992:212). That is why I chose to look at instances of reciprocity and collaboration in the making of “special” assignments as a paradigmatic anomaly and, in that sense, tried to ask, “what must be true about the social context or historical past for

our case to have assumed the character we have observed?” (Burawoy 1991a:281). Through this deductive reconstruction of journalistic “special” assignments and professional discourse, I looked at how situations of collaboration and reciprocity varied from place to place, how they changed over time, and so, “the importance of the single case [lay] in what it [told] us about society as a whole rather than about the population of similar cases” (Burawoy 1991a:281).

This approach has the advantage of avoiding what Everett Hughes has pointed to as the false question of sociology of professions, which is to say, “are these people professionals?” (1984:339), or in this case, “are these people true collaborative or investigative journalists?” Pursuing these equivocal inquiries, a traditional sociologist would then have surveyed dissimilar (or even random) cases and inductively found common patterns and identified definitive “traits”, roles, and identities. These results would then have been diagrammed and reified in indexes, percentiles, and beautiful maps. Rather than continuing this taxonomical and/or jurisdictional quest for the definitive boundaries of the journalistic profession, I decided not to take professional discourses for granted and avoided treating labels like “(un)professional”, “investigative” or “collaborative journalism” as descriptive categories, understanding them instead as historically constructed and reputational ones. Furthermore, contrary to more hermeneutic case methods like grounded theory or Geertzian “thick description”, problematising professionalism meant realising that, as a metaphor, those labels, norms, and cultures are “not innocent”, and that one cannot read and interpret this culture-as-text without “examin[ing] who wrote the text and for whom, and how it was received” (Burawoy 1991a:279). This, in turn, pushed me to dig further into the past.

Methodologically, I began by searching for the origins of the contemporary discourse on the professionalisation of Mexican journalists, which I traced back to what is known as the Mexican “media opening” or *apertura* model in the context of 1990s neoliberal reforms and the “transition to democracy” scholarship. Following the well documented revisionism of the shortcomings of the “transitology” school in other fields (Escalante Gonzalbo 2005, 2018b, 2018a) – which remains surprisingly unchallenged in media and journalism studies – I critically analysed the works of the main exponents of *apertura*, Sallie Hughes and Chappell Lawson (see Chapter 3). During this initial exploratory search, I also found the first timid attempts by Mexican scholars (Guerrero and Márquez Ramírez 2014; Márquez Ramírez and Guerrero 2017) to make sense of the *apertura*’s “paradoxes” and theoretical limitations in the post-transition context. Although this literature also considered professionalisation discourse to be pre-given and hardly questioned or situated it in broader historical processes, it included a few passing remarks about a major international Cold War controversy around a certain UNESCO MacBride Report and a new international information order (NIIO) promoted by the Non-Aligned Movement. Despite their pivotal importance, it was surprising to me that in all my years of systematically reviewing the literature on the matter, I had

not come across any mention of this historical document and debate, which made me realise the hegemony of the liberal consensus and the importance of revisiting it and digging into the 1970s context. The serendipity of this archival discovery opened a prolific rabbit hole and helped me denaturalise and situate the Mexican *apertura* as a part of a whole global transformation impulsed by macro forces. To analyse these historical documents, I followed what Theda Skocpol has called “interpretative historical sociology”. First, I paid “careful attention [...] to the culturally embedded intentions of individual or group actors in the given historical settings under investigation” (Skocpol 1984:368), which in this case included primary records like the UNESCO’s reports and letters, diplomatic statements, political speeches, newspapers clips, and op-eds of the delegates and experts consulted by the MacBride commission and members of the Non-Aligned Movement. It was through this interpretative analysis that I found a very clear instance in which a Western offensive of media owners and neoliberal governments articulated a discourse around the “professionalisation project” as a form of neocolonial domination. In particular, as I document in sections 3.2.1, 3.2.2 and 3.2.3, records from the Reagan and Thatcher administration show how the United States and United Kingdom exerted their *de facto* veto power to derail the NIIO by defunding the UNESCO and discrediting the NAM and the MacBride report. The neocoloniality of this Anglo-American unilateral boycott matters because it silenced critical voices from Third World countries (especially former colonies) which, at the time, represented the majority of votes in a multilateral and democratic forum like the UNESCO. Moreover, documents from the US Department of State show how the Talloires counteroffensive threatened “developing” countries to quit any egalitarian reforms and adopt a pro-market ideology as a condition for accessing bilateral aid and international cooperation. Furthermore, think tanks and industry lobbies such as Freedom House, the World Press Freedom Committee, and the IAPA-SIP legitimised this counteroffensive by mobilising freedom indexes and reports, which reproduced colonial dichotomies of civilisation versus barbarism. These strategies had the effect of discrediting and silencing “undeveloped” and “information poor” countries as ideologised, “Soviet-led”, and authoritarian, whereas “free” and “information rich” countries from the West were considered the only acceptable benchmark of professional standards (Sussman 1984:163).

In light of this historical setting, I then consulted secondary sources (Freije 2019; De Moragas et al. 2005; Mansell and Nordenstreng 2007), whose revisionist interpretations, in turn, confirmed for me that using historical sociology to study the MacBride report and the NIIO controversy was indeed “culturally or politically ‘significant’ in the present” (Skocpol 1984:368), and thus, analytically useful in order to de-normalise the teleology and “timelessness of grand theory” and to “reintroduce the variety, conflict, and processes of concrete histories into macroscopic accounts of social change” (Skocpol 1987:20).

In other words, when looked at through the lens of broad historical patterns and macro forces like neoliberalism and neo-colonialism, the microsocial situations visible in the Mexican “anomalies” of professionalisation became a completely different object: not just unimportant exceptions of journalistic norms that are more-or-less internalised and carried out, but an arena of power struggles where journalists could resist professionalism itself, since in practice it reproduces domination, “erodes the basis of their own legitimacy”, and “so fragments and individualizes the [journalistic] lifeworld that [makes] resistance impossible or ineffective” (Burawoy 1991a:285–86).

Following the ECM’s deductive *significance* and its approach of *extending out* from micro situations to macro forces, I decided to carefully select anomalies or “trouble cases” (Burawoy 2009; Mills et al. 2012:2) by looking for instances where journalists resisted behaving like “lone wolves” or disrupted the jurisdictional exclusion of professional discourse. I found that these social situations were more visible in two settings in Mexico: 1) the nascent solidarity protests and self-organisation movements; and 2) the competitor-colleague and interdisciplinary interactions of people involved in the production of *especiales* or “special assignments”. I am aware that *especiales* is not one of the classic categories – like investigative, civic, watchdog, among a plethora of adjectives – used in media or journalism studies to classify news production. Nevertheless, for various reasons I found *especiales* useful, as not an analytical, but an operative term for my theoretically oriented sampling strategy (Silverman 2010:144).

Firstly, because the “investigative”, “collaborative”, or “watchdog” prefixes to journalism were all disputed and there was no consensus in the field about what their definitions might entail. None of the professional institutions, like training programmes, j-schools, or awards committees, had a consensus on these categories and most importantly, almost none of my participants presented themselves in public or in private using these labels. In fact, even some of the more respected senior journalists I met preferred, in a certain performance of humility, the plain title “reporter” – even if they also worked as (chief) editors – and only bothered occasionally to add “independent” or “freelance” to their title. Instead of narrowing my sample by adhering to one of those equivocal boundaries, I found it useful to work with a broader reputational label like “special assignments”, which, on the one hand, could refer to a good range of cases and, on the other, could shed light on the “ideal” as well as, in contrast, what counted as “regular” or “not special”.

Second, in recent years, different media outlets (mostly digital, but also weeklies, newspapers, television, radio and even some non-profits) have ventured in the production of what they call *especiales*, which loosely involve a sense of being “out of the ordinary”. I liked this subjective dimension of “special assignments” because it involved a varied corpus of cultural production where formats, genres, topics, and mediums mixed: sometimes they appeared in expressly created “*Especiales*” sections or microsites; sometimes they were submitted to award contests; sometimes

they appeared in one-off special issues; or sometimes as part of a collective platform. Moreover, these “special assignments” also covered a diverse range of themes or beats: from sports, tourism, and urban planning, to offshore, corruption, and shell companies, not to mention elections, the military, migration, drug trafficking, femicide, and the resistance of social movements.

Using “special assignments” as an exploratory category helped me to panoramically scan recent journalistic production in Mexico (regardless of its media type or political impact), with a particular focus on the markers of the anomalies I was interested in observing. This constantly adaptive and evaluative approach had the advantage of allowing a wide range of unlikely cases to enter my sample, leaving room for “unconventional” examples, thereby following Becker’s recommendation of looking “for the most unlikely things that we can think of and incorporat[ing] their existence, or the possibility of their existence, into our thinking” (Becker 1998:86). Moreover “following the thing” and “following the people” involved in producing “special” assignments” (Marcus 1995:106–7) meant adopting a multisited approach to ethnography, which I develop in further detail in the section on participant observation.

My sampling strategy had two stages. In the first stage, I deconstructed news as artefacts, which enabled me to find and make visible various markers of social situations, such as alliances, collaborations, teamwork, use of interdisciplinary expertise, and enunciation of dead-ends or challenges in the case. This first stage was the most important and involved a constant scanning of Mexican news production (roughly from 2014, when the “Mexican boom” was supposed to have started), through which I aimed to identify the network of actors (starting from reporters and editors) involved in “special assignments”. In a second stage, building up from this initial sample and depending on the level of access to the field, I used “snowball” strategies to try to reconstruct the networks among my participants. I repeated these stages until I developed a sense of network clarity, in other words, until I felt “no new properties or dimensions [were] emerging” by adding more cases and instances of comparison to the sample (Holton 2007:234). Finally, each of the three main case studies in this dissertation – Mexico Leaks, Panama Papers and La Estafa Maestra – was carefully selected because their social situations best highlighted the anomalies I used to move from sociology of professions to sociology of networks and expertise.

2.3 NEGOTIATING ACCESS

In the months of preparation prior to my flight to Mexico and at the beginning of my ethnographic research, I mobilised my own personal network in Mexico to explore the best ways of reaching out to journalists. At first, I was anxious because journalists, compared to other occupations, are particularly concerned about the risks of dealing with sensitive information and managing their sources confidentially, and they often work under intense time and reputational pressures, making

them, as subjects of study, generally cautious and reserved with strangers, and sometimes impatient with time-consuming academic research. Luckily, through personal contacts – university friends and one of my cousins – who were either journalists working in Mexico or knew personally some of the journalists in my initial sample, I managed to gain vital advice on how to carefully approach the field and my participants. Generic cold-emailing was avoided and instead the initial contact was established using the personal endorsement and recommendation of fellow colleagues, who introduced me via Whatsapp – a reference that made all the difference, judging by the quick and positive replies of the journalists contacted. For this I cannot overstate the importance of my research affiliation to Periodismo CIDE, one of main clusters which brings together different cohorts of Mexico’s journalistic elite through its postgraduate j-school programmes and training platforms for investigative journalists in Mexico City. Gaining access to this community smoothed my induction to and deepened my understanding of the field.

From the start, I sought actively to get involved in Periodismo CIDE’s community, thanks to the lessons I gained from pre-field enquiries in the UK, which proved to be full of methodological insights. First, in June 2017, I attended the Centre for Investigative Journalism (CIJ) Summer Conference at Goldsmiths University, a three-day training camp where practitioners participated in workshops, panels, and keynote lectures. I found this type of site advantageous for two main reasons: 1) it was a unique opportunity to observe journalists asking everyday questions to other journalists using practitioners’ terms and jargon, having naturally occurring discussions, and giving descriptions of all sorts of reporting cases, “hands on” practicalities, common problems, and the kind of answers ordinarily given; 2) it was a great setting for observing how journalists interact with a diverse pool of colleagues and competitors, as well as with “non-journalistic” experts, since some of the training sessions were held by lawyers, data scientists, programmers, activists, accountants, corporate investigators, among others. I soon realised this type of site had the advantage of making visible the tensions, professional boundaries, and even communicative and translation challenges involved in interdisciplinary collaborations, which would keep emerging later on in my own participant observation in Mexico.

Second, a month earlier, in May 2017, I attended the book presentation of *The Sorrows of Mexico*, which took place in a room full of Latin Americanist scholars and students in Cambridge. There, two internationally renowned Mexican journalists gave passionate speeches on the perils of their investigations, mobilising discourses of heroism, sacrifice, and about the crisis of journalism with such efficacy, theatricality, and fluency that most of the Q&A revolved around the audience’s gratitude, honour, and personal admiration for the journalists. The passion and inflamed conviction on display charged the room with social energy and made me critically aware of the fascinating performative dimension and power of professional discursive practices, as well as the unique

opportunities these public events and professional gatherings represent for observation. Additionally, the informal mingling after such events offered privileged occasions for cultivating face-to-face rapport and introducing myself to potential participants in a relatively safe and familiar context, during which journalists were predisposed to network, disseminate their work, and be open to welcoming the interests and intentions of attendees, like myself, as genuine.

2.4 PARTICIPANT OBSERVATION

Once I realised the advantages these settings presented for my study in terms of observation and access, I actively tried to frequent similar gatherings and public events in Mexico. For this, Periodismo CIDE was crucial. Thanks to the generosity of the director and academic staff, I was awarded with a fellowship as Visiting Researcher and granted full access to two exclusive sites: the j-school courses and the diploma programme on investigative journalism – not to mention public events such as book presentations and the interdisciplinary seminar “Prensa y Poder” (Press and Power). And so, for the first four months of my fieldwork, I woke up every day at 6am to take the “CIDE bus” and attend the morning classes of the Masters in Public Policy Journalism¹¹ along with a friendly cohort of 12 journalist-students working in all sorts of different media outlets and positions: from the younger generation covering breaking news at digital business outlets, or art and culture in public television, to journalists in their thirties freelancing on education and migration or anchoring daily news TV shows, not to mention senior reporters specialising in covering courts and the justice system or the corporate and finance beat for print magazines. While I was aware that the classroom and teacher-student dynamic involved a controlled setting, different to “real life” reporting-publishing or editor-reporter relations, I found it in fact to be an ideal site for studying professional discursive practices for two main reasons.

The first was access to participants. Most of the teachers were the very chief editors or experienced reporters who were leading investigative units and collaborative projects in *Animal Político*, Quinto Elemento Lab, *Proceso*, Mexicanos contra la Corrupción (MCCI), among others. Moreover, as part of the class, the teachers-journalists invited “expert” allies and people they had collaborated with in the past to talk to us about their projects. These included human rights activists, data scientists, statisticians, and other journalists from different media outlets. Both teachers and invited speakers often dissected in detail their recently published *especiales* and shared

¹¹ In its first semester the programme had eight courses, half of which were taught by academics (mostly economists, statisticians, and political scientists) and the other half by senior journalists. I chose to attend the latter, which included: “Mechanisms of News Production”, “Communication and the Construction of Public Opinion”, the “Workshop on Reporting the Business Sector” and the “Workshop on International Journalism”. Due to the CIDE’s interdisciplinary effort, I also wanted to pay attention to the blending and crossing processes between academic and practitioner-led courses. Thus, I also decided to attend “Applied Social Sciences’ Methodology for Journalistic Work”, one of the academic-led courses.

their decision-making and “behind-the-scenes” experiences with us, the students, as a case study-based pedagogical device. This helped me greatly to introduce myself to participants and expand my sample, but most importantly to refine the questions I would ask weeks later once I was able to formally interview the actual reporters and other media workers involved in producing those *especiales*.

The second reason was immersion. Every day I had the opportunity to participate in all sorts of verbal and non-verbal activities, which, little by little, helped me access the cultural insider perspective of my cohort and teachers; and understand their “native point of view” as practitioners and cultural “experts” in navigating the journalistic world in Mexico. The most interesting part of the classroom as an ethnographic site was again the chance to observe journalists *asking* questions to other journalists (with various degrees of experience) about concrete practices and situations. These naturally occurring discussions and collective examinations among practitioners were invaluable – in particular, the way teacher-journalists and student-journalists questioned, qualified, and concurred and differed over professional conventions by sharing personal anecdotes, practical constraints, and real-life predicaments. Additionally, I got to chat informally with my classmates while sipping hot coffee to keep warm and awake in the cold mornings of the CIDE’s mountainous climate, or during after-class study groups and bus rides back to Tacubaya or Observatorio metro stations. These casual conversations often revolved around the best ways to pass exams, but they were also a chance for me to clarify their use of journalistic jargon or their passing remarks in class, to gossip about Twitter controversies and dramas, and to make a cartography of the “who’s who” and “who gets along with whom” of the Mexican journalistic community. Despite being a Mexican born in the outskirts of Mexico City, I was pretty much an outsider to their journalistic world, a position which was, in a way, a research advantage, because my classmates treated me as a curious novice and so, remembering I knew very little, they often stopped and explained basic terms in simple words, and generally there was an attitude of not taking things for granted around me, which gave me the initial confidence to ask “silly” or “obvious” questions.

Another key ethnographic activity involved not only talking but *doing*. As part of the continuous negotiations for access, in the workshop “Mechanisms of News Production”, the teacher-journalists insisted that I do the work just like everyone else, which consisted of writing short news assignments (similar to the daily news format, known as *notas*) on current affairs, picked by the teachers for each class, and at the same time continuing to work throughout the term on a longer-format piece or *reportaje*, which we were told in “newsroom time” corresponded to a couple

of weeks' assignment, the topic of which was picked by the student.¹² Both *notas* and *reportajes* were polished (*tallereados*) and edited in class by the teacher-editors with the participation of the students. This was a rigorous editing process and a harsh evaluation experience for the author whose text was under collective scrutiny (even though all assignments were previously anonymised), especially for an absolute novice like me, who had never engaged in producing news. To be honest, at first I was not very fond of this exercise because it put me out of my comfort zone, and at the bottom of the class, and I was not sure if reporting would “take time away” from my research goals, which responded to my implicit belief that I could access local knowledge just by asking without first “learning how to ask” (Briggs 1986), and the rush of securing scheduled interviews to ask my own research queries and questions. However, this challenging “detour” ended up providing me with the impetus to learn by watching and the patience of “listening before you leap” (*idem*), which was earned by the painful process of “trial and error” into which I threw myself. Without a contact book, I had to ask my classmates, my cousin, and the trusted informants I knew for all sorts of favours: practical advice, tips on news angles, phone numbers of potential sources or people who might know someone relevant, etc. I also had to make up for my “academic handicap”, for often I barely met the deadlines after intense all-nighters, or failed to write in an appropriate journalistic style (sometimes it was deemed too embellished, sometimes too academic: *escribir bonito*, *escribir paperismo*), or find an angle that was considered newsworthy or of journalistic interest.

On the one hand, this feedback was revealing because, following Briggs, “when I failed, they pointed out the source of my error either verbally or by [...] showing me how the step is performed, that is, providing me with a model for direct imitation” (1986:64). In that sense, not only were the journalists generously and unsparingly teaching me how to learn, but I was being schooled on their professional socialisation and enactments, “cultural processes of evaluation, validation and authentication”, as well as the “institutionalized of ways of seeing and speaking” (Carr 2010:18) like a “real” journalist.

On the other hand, it made me aware, echoing Howard Becker (1986), of the fact that it took a small village of people to produce even my rudimentary *notas*, and that a sociological understanding of this cultural production needed to pay attention not only to the degree of professionalisation of individual reporters, but to the social interactions of a network of people “doing things together”, cooperating to “get the work done”. Moreover, *doing* journalistic work also involved *feeling* the emotional dimension of reporting, the thrill of “geeking out” (*clavar*) or discovering a new lead, source, or angle, which would later emerge repeatedly in other interviews

¹² In my case, I decided to report on the invisibility, policy shortcomings and life-experiences of internally displaced journalists living in Mexico City.

and observations outside the classroom through the notion of “sharing the excitement”. Overall, as months went by the process of (co-)producing my final *reportaje* ended up being an important source of insights which shaped my research strategy and reflections as I went along during fieldwork. Specifically, the whole experience in Periodismo CIDE j-school was a lesson in humility, vulnerability, and introspection into my own knowledge-making practices, and the ways in which social scientists “mirror and are mirrored by other ‘expert knowledge makers’”, in this case journalists (Briggs 2007:565). However, I was also aware that this pedagogical exercise was not published as news and therefore I did not experience the risk and responsibility that comes with putting your work “out there” in public opinion, as my participants manifested in subsequent interviews.

Additionally, every Saturday morning from September 2017 to January 2018, I attended the Diploma Programme (*diplomado*) on Investigative Journalism organised by CIDE and funded by MCCI. The *diplomado* was a paid for series of 17 training sessions, five hours each, with an examination at the end to assess the participants and grant them diplomas. This was a very interesting setting, which I decided to observe for various reasons. Firstly, the speakers themselves had more diverse backgrounds and expertise in and outside of journalism. The *diplomado* had three main modules: 1) “Concepts and legislation”, where academics, activists, and civil servants explained Mexico’s policies on transparency, accountability, anti-corruption, and open government; 2) “Sources and tools”, where senior journalists, lawyers, and audit experts explained how to use public registries, budgetary accounting, and databases; and 3) “Successful case studies”, where national and international journalistic investigations were explained “step-by-step” by their authors. In this sense, their interactions with a room full of journalists were an ideal situation to observe and compare how speakers and practitioners behaved, reacted, and dialogued differently, which made visible their professional codes and boundaries, but also instances of collaboration, complementarity, and a disposition to discuss practices, challenges, and common problems. Secondly, as the *diplomado* progressed and the cohort started developing a sense of community and a certain companionship, reporters started expressing at various moments how much it meant to them to be part of a network, a feeling that was new and rare in a guild where reporters – as we saw in the theoretical chapter – manifest a deep sense of loneliness and abandonment.

Finally, the *diplomado* attracted a more diverse pool of participants from other states outside Mexico City, who had published *especiales* in local and national media outlets, or at least were interested in training and joining the “investigative and collaborative” scene. As mentioned in my sampling strategy, though I did not have the time or resources to conduct fieldwork in other regions of Mexico, by joining the *diplomado*, I got the chance to meet, compare, and learn about the experiences of local reporters from Tlaxcala, Michoacán, Veracruz, Puebla, Querétaro, and

Coahuila – some of whom I interviewed later. It must be said that this diversity was also relative because even though the *diplomado* had a partial scholarship scheme,¹³ in order to attend journalists had to make the effort to travel to the capital every weekend and invest money and resources and free up time from their workloads to complete the course. In this sense, their experiences, and opportunities, while more precarious and riskier compared to other journalists in the capital, showed elements of being those of a local occupational elite. Moreover, I was constantly reminded to bear this caveat and positionality in mind since the *diplomado* took part in the impressive penthouse conference room of one of the newest and most luxurious skyscrapers in Paseo de la Reforma, one of Mexico City’s most iconic and exclusive boulevards.

In retrospect, during the research design and fieldwork stages my initial concern and subject of self-reflection was mainly navigating the power and epistemic dynamics between my position as an academic (a sociologist from Cambridge) and my participants. As a brown (*moreno*) Mexican researcher from a working-class family (with Marxists parents), but socialised in centralist Mexico City and with the privilege of an elite international education, I paid particular attention to critically examining the neocoloniality and elitism of Anglo-centric discourses and scholarship (see section 3.4) of Mexico’s so-called failed media opening and recent investigative boom (section 4.1). However my position, also, as a straight, cis-male, *mestizo* researcher made me less aware of other forms of oppression intersecting in my participants’ experiences, which were not incorporated from the beginning and could have been elaborated further in this study. It took me some time to realise that the “lone wolf” ideal subject was more complex than I thought. I came to realise the intersectionality of the “lone wolf” late in the writing up process and even though I had some insights – mainly from my interviews with feminist journalists from the *Periodistas de a Pie* network – I did not have chance to flesh this out as fully as I wanted at this point. My methods left some room for including some degree, at least, of this complexity. It was through the biographical technique I used in my interviews and the participant observation of assemblies, public discussions, and forums that I could listen to women’s accounts on how much tougher it was to be a female reporter in Mexico. As scholars like Vanessa Freije have pointed out, the feminist journalists I talked to highlighted how key editorial decisions and source relations were dominated by men and performed “in spaces of masculine sociability” like *cantinas*, night clubs, and shooting ranges (Freije, 2020 Kindle ed. Conclusions, loc.586) from which they were excluded. Also, through recounting their life trajectories, my participants pointed out how they grew frustrated with the way male editors from traditional media excluded them from the glory of the National or Politics beats and

¹³ The full price was around \$1,700 USD, a sum that, even by Mexico City standards, represents three or four months’ salary.

relegated them to become “*pobretólogas*” (“povertologists” in Spanish) specialising in “social” beats (Education, Migration, Society and Justice, Metro, Culture, and Entertainment), which bosses thought to be lesser, “feminine” beats. Experiences like these impacted my research endeavour, albeit late in my analysis – but still, they informed the way I conceptualised the different dimensions of the “lone wolf” ideal subject. In section 4.2, I point out that the lone wolf is thought of by journalists in terms of an alpha male. Moreover, I realised that if the lone wolf professional culture reproduced gender oppression there were good reasons to believe that other forms of domination like racism or classism should be included in this matrix. For instance, in chapter 4, I briefly mention that the lone wolf ideal subject is not only about who has the privilege to access the Watergate ideal, but also the power that the lone wolf has to determine what is worthy of *his* attention, what social problems are considered as frontpage “wrongdoing”, what beats embody investigative glory, and who is entitled to that honour. It is not a coincidence that what white, grizzled, male editors considered lesser, “social”, and “feminine” beats were precisely the stories of Black and Indigenous women, migrants, sexual dissidents, people with disabilities, as well as rural, marginalised, and poor communities. I tried to include some elements of this intersectional complexity that go beyond neoliberal apolitical individualism – beyond what I describe as the loneliness-solitude tension – by pointing out that lone wolf is white/*mestizo* and reproduces whiteness; by describing how the lone wolf is praised in terms of toughness to the point of martyrdom and despises vulnerability and care as weaknesses; and how the lone wolf is feral and may bite anyone at any time. However, these remarks are only a blueprint and if I was able to go back with the benefit of hindsight, I would ask the journalists more about these intersections and look for more interviewees from these standpoints. I believe there is a great deal of sociological imagination to be unleashed by conceiving of the lone wolf professional culture as a “matrix of domination” (Hill Collins, 2002, 18), which necessarily entails incorporating the appropriate theoretical and methodological tools early on as part of the research design (Viveros Vigoya, 2016; Moreno Figueroa and Viveros Vigoya 2022). Exploring further the way that different kinds of oppression coalesce in the “lone wolf” journalistic ideal is one of the main lines of enquiries this study opens up for future research.

2.4.1 INSIDE THE NEWSROOM

Overall, my involvement with CIDE’s j-school and *diplomado* was instrumental for gaining access to more private settings, especially because its extended network of journalists and experts overlapped to a certain extent with my sample and the expertise networks involved in the making and publishing of *especiales*. I actively sought to observe these networks in a range of social situations, including the classic locale of journalism studies: the newsroom. And so, thanks to my

CIDE institutional affiliation and constant presence in that scene, by the end of October 2017 I managed to cultivate the trust of some of the reporters who attended the *diplomado* and were involved in what would later be known as the Paradise Papers – although at the time it was the best-kept secret of the International Consortium of Investigative Journalists (ICIJ), only known to a handful of Mexican journalists. The opportunity came from a senior reporter from Mexicanos Contra la Corrupción (MCCI), whose invitation to join the newsroom had two conditions: that I help translate key documents from English to Spanish and keep the secret until at least the publication date (6th November 2017).

And so, I was assigned a desk in the open-office island, where reporters and editors worked elbow-to-elbow, and started translating as best as I could (as we discovered, the offshore terminology of reinsurances and equity required a completely different type of language fluency and literacy) all sorts of leaked confidential documents and email exchanges from the top offshore law firm, Appleby, mentioning business deals and client meetings in Mexico's public and private sector – all the while taking fieldnotes. Although the few editorial meetings were off-limits due to my recent addition to the newsroom, during the time I was in the office (usually from 9am to 9pm), most of the interactions between reporters (junior and senior) and editors or directors happened in the open working space and the small coffee room, during lunch breaks. Thus, in a short time I was able to get to know the details of the stories everyone was developing and observe their everyday work: using artifacts like databases and blackboards to construct narratives; discussing angles and headings; phoning sources and experts; or discussing (sometimes reticently) the convenience of sharing information, publication calendars and launch strategies with other “competitor-colleagues” from the Paradise-ICIJ's network (like *Proceso*, *Univisión* or Quinto Elemento Lab); as well as showing their frustration when scoops were rushed and their impact lessened (*quemar la nota*) due to what they saw as miscommunications and competitiveness on launch day. This participant observation in the weeks prior to and after the big international launch of the Paradise Papers helped me adapt my research strategy and prioritise interviews over newsroom observation for several reasons.

First, some of the journalists who were working on the Paradise Papers in Mexico were the same ones who had worked in previous ICIJ revelations, namely the Panama Papers. So, as I interviewed them one-to-one on the collaborative challenges in the Panama project, I realised that the triangulation technique I was using to conduct interviews was working because what I observed during my weeks inside the newsroom was very similar to the accounts and descriptions the same journalists told me about past experiences. This methodological trade-off meant that, even though there was an inevitable loss of detail, by prioritising interviews over a more conventional single-site ethnography I could compare a more diverse range of social situations involving collaborations

and reciprocity. In this sense, my decision to opt for a multisited approach was informed by the extended case method and what George Marcus calls “following the conflict” and “following the metaphor” in a “variety of distinct discourses and registers [...] and in the ethnographic characteristics of their social locations” (1995:108).

Secondly, my decision was also determined by practical barriers of time and space, namely: 1) some of the newsrooms in my sample were relocated due to the damage to their buildings during the major earthquake that took place in Mexico City on 19th September 2017. This unanticipated disaster pushed media outlets, as in the case of *Animal Político*, to improvise emergency pop-up newsrooms or “newsroom moves”, which, as Nikki Usher (2015) has shown, dislocate the traditional role that these spaces play in work routines. 2) Contrary to ethnographies on the coverage of certain beats, the production of *especiales* has unpredictable timing or seasonality. This meant that while I was in the field there were only a couple of ongoing investigations being produced that I was aware of, especially because, by the end of 2017, the most important and pressing issue for the journalistic guild was how to prepare and coordinate their news coverage for the upcoming presidential elections of 2018. Thus, most of the news I studied were published before my arrival or were about to be finished shortly after my arrival. And 3) after a few conversations with different editors, I realised that reporters involved in *especiales* were more mobile and worked more remotely than I initially thought: some of them only touched base in the newsroom fortnightly for editorial meetings or rarely used the newsroom desk as a daily physical space to work in and discuss the progress of the investigation. Sometimes, work was produced and coordinated remotely using sharing platforms such as shared drives and group chats, which led me to pay attention to the materiality of co-production and reflect on the convenience of rethinking and decentring the place of the newsroom as the locale par excellence in journalism studies (Usher 2018:10).

2.5 INTERVIEW TECHNIQUE

So far, I had managed to gain access to professional forums and settings where “investigative and collaborative” discourse was promoted, and “step by step” techniques were articulated and discussed among peers and expert allies. However, my participant observation indicated that there was gap between this public discourse (charged with tones of innovation and enthusiasm) and real-life practice, where all sorts of tension, frustration, challenges, disagreements, and reticence emerged. Thus, in this section I expand on how I designed and conducted a double-session strategy (one biography-based and one case study-based) for conducting semi-structured interviews under a pragmatist-oriented approach, precisely to make visible that gap between discourse and practice: between what is professionally expected to happen and the messy “trial and error” of what actually happens.

Drawing on the abovementioned lessons at CIDE and the wise advice of trusted informants, I knew that asking about the “conflictive” dimension of cooperation was a sotto voce and sensitive topic, which required being handled with tact, patience, and humility. While I was aware of the methodological limitations of reconstructing activities and practices via a posteriori codified studies such as interviews, I decided to tailor my semi-structured interviews to focus on retrospective and detailed accounts of the reporting processes of specific past assignments. My aim was to be able to use my respondents’ verbal formulations as a valid proxy for the observation of actual behaviour through three strategies: 1) promoting what Holstein and Gubrium (2002) call active and communicative interview encounters – a perspective that acknowledges respondents not as “vessels of answers”, but as interactive co-producers of meaning; 2) prioritising in-depth interviews and question guides on the concrete situations, processes, and negotiations involved in the making of a given “special” assignment, rather than looking for what researchers often call the “typical work day” – in fact, I actively tried to avoid the temptation of reifying the “typical” in my questionnaires; and 3) systematically using techniques of cross-referencing and triangulation of accounts (Holstein and Gubrium 2002). To tailor this methodological emphasis on observing controversies and “following the conflict”, I drew on my previous research experience at the EHESS-Paris, in particular with what is known in the Francophone strand of pragmatist-sociology as *épreuves* (*desafíos* in Spanish) – that is to say, “moment[s] of potential reversibility of relations of domination”, in which the social order is reassessed, implying an “uncertainty weighing on its outcome” and a certain performative achievement (De Blic and Lemieux 2005, 15). Thus, I found it useful to operationalise the situational notion of *épreuve* by following Lemieux et al.’s PCADO approach, which involves questioning interviewees on Practical situations, Conflict or controversies, relevant Anecdotal examples, and Objective Data (*données objectives*) such as age, formation, job security, and workloads, among others (Lemieux and Moreau de Bellaing 2015). I devised two interview guides (with supplementary questions for editors and non-journalistic experts), reproduced in full in Appendix 2, and each interviewee signed a consent form, included in Appendix 3.

2.5.1 BIOGRAPHICAL INTERVIEW

I found the biographical interview technique particularly useful for my study for several reasons. On the one hand, if being involved in the production of “special” assignments was seen among scholars and journalists as a rare opportunity and an occasional cultural product, the questions that kept arising in my mind were: what did the people involved in these assignments do the rest of the time, when nothing “special” happened? What was their coming-of-age process (from novices to more-or-less integrated professionals) like? How did their paths shape and inform their current

lives, present perspectives, and courses of action? On the other hand, I did not want to repeat the essentialism or evolutionism of past approaches (discussed in Chapter 3) by accepting reputational labels at face value or continuing the chimerical quest for the true “professional” or definitive “investigative” attributes and the new “collaborative” breed of journalist. Instead, by following the life histories of my participants, I aimed to systematically “reveal juxtapositions of social contexts through a succession of narrated individual experiences that may be obscured in the structural study of processes” (Marcus 1995:110). For this, the biographical method has the advantage of making visible how the contingency of interactions in actors’ lives overrides an analysis of organisations or fixed on binary professional identities, leaving space for life chances, switches in life paths and different repertoires of actions, activated and adapted by the same individuals as they move across institutional boundaries. By studying my participants’ biographical trajectories, I also aimed to capture instances which revealed the formation of and encounters with professionalism at earlier stages in their career.

Following Rosenthal (2004), the way to operationalise this biographical focus in my interviews was by tailoring an interview guide (see Appendix 2) and technique in which: 1) questions were asked in sequential and chronological order (starting from the participants’ first reporting experiences to their present involvement in “special” assignments); 2) after an initial period of self-presentation from the interviewee, follow-up questions were asked addressing specific situations, themes or arguments already mentioned in previous answers; 3) non-interrogative or paralinguistic expressions of attentiveness were used to avoid disrupting the narrating until a phase of the interviewee’s life was deemed sufficiently covered or reconstructed; and 4) where pertinent, clarifications were requested for the triangulation of data. To develop my active listening skills, the abovementioned experience of “learning how to ask” by observing peer-to-peer questioning among journalists was vital, as well as studying Studs Terkel’s interview guides in his book *Working: People Talk about What They Do All Day and How They Feel about What They Do* (1975) and Daniel Okrent’s critical but empathic style as an ombudsman in *Public Editor #1* (2006).

The semi-structured and exploratory character of my interviews aimed to leave open the possibility for unexpected or mistakenly underestimated lines of enquiry to emerge in the participant’s narration of their occupational life history. Thus, interview guides were prepared and tailored specifically for each interviewee and, although they covered similar topics, each interview differed from the others in the extent that the situations and events mentioned in the interview informed the follow-up questions. Furthermore, the trajectories of my interviewees often crossed paths. As participants were often members of collaborative networks, the same situations were experienced by more than one interviewee, which proved very useful for triangulation and

comparative purposes, since the accounts and anecdotes brought up in one interview informed the questions I asked in the next.

Preparation was key, but also demanding. Usually, I dedicated the day before the scheduled interview to gaining as much background knowledge as possible via an extensive revision of the interviewee's online activity, curriculum (when available), texts and audiovisual content, and their public interventions in social media, conferences, and media interviews. This strategy helped me to have this background knowledge "fresh in my mind" and to gain depth in detail, embeddedness, and familiarity with the participant's discourse, while at the same time avoiding asking questions that had already been answered in past communications. Journalists responded positively to this preparation, allowing me to continue interviews on average from two to three hours during each session, despite their busy agendas.

2.5.2 CASE-STUDY INTERVIEW

Most of the participants were asked to attend a second interview session, where we focused on their "special" assignments as case studies and tried to reconstruct concrete anecdotes, situations, meetings, and negotiations concerning the practical details and challenges of collaboration. Overall, due to their hierarchy and busy agendas, it was more difficult to successfully schedule these second interviews with editors than with reporters. Additionally, for practical reasons, in the case of journalists coming from outside Mexico City, I divided the time of our single session into two halves: biographical and case-study. Out of the 32 initial interviews with journalists, 13 attended the second session, which inevitably meant that the vision of the rank-and-file reporter became more predominant in my research. Although not ideal, prioritising the reporter's point of view was a conscious decision I made, on the one hand because the editors' actions showed up constantly (sometimes under a critical light) in the reporters' accounts and, on the other, because historically the voices of editors-in-chief and members of senior management have had more visibility and attention in both media studies and the industry, whereas the reporter's "bottom-up" and subaltern perspective tends to be neglected or underestimated. For the research goals of my study, the reporter's perspective was central to reconstructing how "work gets done" in everyday life. Although this dissertation focuses predominantly on journalists, I conducted seven case-study interviews with different non-journalistic experts: from an information designer/programmer, a lawyer, and a human rights activist, to audit and due diligence and compliance investigators, not to mention academic researchers collaborating in journalistic projects. This responded to my awareness that journalism was only one side of the practice, and not always the central node, and it constituted an active effort on my part to interview a diverse range of actors and gather

perspectives from different nodes in networks of expertise. I will elaborate further on this point in my section on the limitations of this dissertation.

On the matter of interview preparation, similar to the first session, in the second case-study interviews I relied heavily on the revision of online data. First, I contextualised and dissected the published piece (including its credits, methods section, footnotes, appendixes, and raw open data where available), taking notes and listing Sources, Actions, and Players,¹⁴ to elaborate a chronological timeline of key interactions, events, reporting decisions, and post-publication reactions. Second, using this timeline I visualised the stages in the reporting process, identifying potential questions, and cross-examining the accounts of the people involved in the assignment. Third, since most of the case studies examined had already been published, I had the chance to pay close attention to their dissemination campaigns and to monitor (using advanced search tools, mainly “:site”, “:from” and “:intitle”) my participants’ interactions and controversies in social media (mainly Twitter and Facebook), which is one of the main forums for observing professional debates and judgements among peers and networks, as well as the reactions of powerful actors (politicians, economic elite, media owners, etc.).

Even though these netnographic methods, text analyses and consultations of electronic archives and media outlet websites were, in a way, the shortest leg of my study, I drew heavily on these data and my participant observation experiences to structure my interviews. In fact, it became a routine for me to keep triangulating data, contrasting accounts, and monitoring the comments and reactions of my participants, mainly through social media and various Whatsapp occupational groups, in which I was included, and which proved very useful for me to remain “in the loop” and continue mapping out changes and continuities in their professional relations, trajectories and positionings after I left the field. These internet-based research implied different ethical challenges, which I discuss below in further detail in the ethics section.

Overall, my complete dataset comprised 53 formal semi-structured interviews (those with signed consent forms) with 39 actors (32 journalists and seven experts). From the total of journalists interviewed, 20 were interviewed with both biographical and case-study approaches. On average, each session took between two and three hours. Also, 17 were considered senior staff, which means that they had more than 20 years of working experience as well as editorial and/or directorial positions. Fifteen were considered junior journalists as they had less than 20 years of working experience and little to no editorial/directorial experience. Gender-wise, 41% of interviewees were women. In terms of the regional diversity of participants, most of the

¹⁴ In my fieldnotes I used three types of codes “[F]” for sources (*fuentes* in Spanish), “[A]” for action (*acción*) and “[P]” for Player (*persona*)

interviewees worked in Mexico City, but their trajectories and provenance were broader, including places such as: Puebla, Michoacán, Veracruz, Quintana Roo, Guanajuato, Jalisco, Sinaloa, Chihuahua, Estado de México, Baja California Sur, as well as experience abroad in Spain and France. The complete interview list and some descriptors of the whole sample can be seen in the table below. Additionally, multisited ethnographic fieldnotes from participant observation in Mexico (July 2017 to end of April 2018, and two additional short trips in August 2018 and November 2019) were registered in seven notebooks, and I gathered over 90 audio recordings from two weeks' observations inside MCCI's newsroom, two visits to *Animal's* newsroom and two visits to *Proceso's* newsroom. Additionally, my records included my observations on public events and meetings for journalists, as well as my participation in Periodismo CIDE's classes, diploma, and research seminars (see Appendix 1). Finally, open-source information included continuous monitoring of social media interactions of the networks and interactions of my participants with the journalistic community, mainly on Twitter and Facebook, as well as through Whatsapp professional groups (only for background knowledge, no direct quotes from these message groups were used in the dissertation).

2.6 DATA ANALYSIS

Rather than leaving my data analysis to the writing-up stage back at my desk in Cambridge, my analysis process started early on during fieldwork and was intimately related with the writing-down and jotting of fieldnotes. This took a lot of energy, especially after a long day of travelling on Mexico City's public transport, but everywhere I went (whether engaging in participant observation or interviews), I made an effort to find a café or a quiet corner afterwards to write down short memos in my notebook or cell phone notepad (which had the advantage of being searchable text) with my commentaries on the significance of what I had observed and experienced. I found it useful to classify these notes and asides into three broad exploratory categories: 1) methodological notes "[MN]", which helped me figure out and test whether my sampling, access, and data collection strategies were actually working or if they needed calibration on a day-to-day basis; 2) theoretical notes "[TN]" explored how what I was observing/experiencing related or not to what was described by concepts and theories in the literature, as well as how it contradicted my preconceptions and what I expected to find in the field before I entered it; and 3) observational notes "[ON]" which, by themselves, included three levels of analysis, namely, what my participants said they were doing, what I saw them doing, and what was my personal "lived sense" – that "feel" for or "emotional reaction to events" (Emerson, Fretz, and Shaw 1995:81). This constant reading and (re)writing of commentaries and notes continued in numerous iterations, promoting "active processes of interpretation, [selection] and sense-making [...] while participating in an intense and involved manner [in the field]" (Emerson, Fretz, and Shaw 1995, 8–9).

Moving from the field to the desk, I processed my interview recordings into text datasets by transcribing them manually in their original language, Spanish, to capture the rich linguistic subtleties of native speakers, and to avoid problems of communication and lack of context. My fieldnotes were also written and coded in Spanish, and in turn only the direct quotes used in this dissertation were translated, by me, always trying to fairly translate foreign in vivo expressions, comparable concepts, and analogous terms from Spanish to English. I then engaged in different cycles of labelling data and linking them with ideas and patterns through a heuristic process: “[from] close reading, open coding and writing of initial memos [...] to focused coding and writing intensive analyses and integrative memos” (Emerson et al. 1995:144).

I used the qualitative data analysis software (QAQDAS) Dedoose to facilitate the coding and organisation of my transcriptions, and to benefit from different tools and functions for searching, tagging, coding, linking, and back-linking. The first type of codes I used were “in vivo”, which aimed in the first cycles to identify a broad variety of descriptive folk categories “rooted in participants’ own language” (Saldaña 2009:6), and only then, little by little, did I move towards a second cycle of more focused coding, aiming for a thematic analysis with emerging concepts and variations within themes. This is how I initially identified the “lone wolf” as an in vivo code. Following my participant’s own words, I initially linked the “lone wolf” to codes like “not sharing information” or “prioritising competition and scoops”, and with these categories in mind, I began to write up the draft of my first empirical chapter, which identified the theme of competition and collaboration.

However, as I showed in chapter 3, it was only after I presented my preliminary findings in CIDE’s “Prensa and Poder” Seminar and witnessed how a former editor-in-chief of *Reforma* phrased collaborative practice in terms of “vice” and deviance from how a true journalist should behave, that I realised that the concepts of collaboration and competition were not a super-category, but a subcategory of professionalism. In turn, I went through my data again using a more focused and fine-grained coding of selected notes, which helped me identify the concept of professionalisation as a core theme and then look for similarities and variations between instances, as well as subthemes that described my participants’ words at a higher level of abstraction. This is a testament of how the data did not “speak for themselves” and how vital these ongoing analytical cycles of “reviewing, re-experiencing, and re-examining everything that has been written down, while self-consciously seeking to identify themes, patterns, and variations within this record” (Emerson et al. 1995:144) occurred from the beginning to the latter stages of my research. This constant process of moving back and forth from the fluidity of fieldwork and fieldnotes to a more focused analysis made me aware of the need to explicitly reflect on and share with the reader (wordcount permitting) how the elements I found “interesting” and “significant” evolved

throughout the construction of a thematic narrative in this dissertation, a process whereby “initially, our understanding of what is going on – what is interesting – may oscillate wildly, but over time the oscillations diminish (if all goes well) as we converge toward a stable interpretation” (Burawoy 1991b:294).

2.7 RESEARCH ETHICS

Before entering the field, I was aware that as a setting for researching journalism, Mexico already had a high-risk profile. Since 2006-07, the country’s dramatic increase in levels of violence has come with a similar rise in all forms of anti-press violence: from journalists being sacked, threatened, or sued after publishing revelations, to being illegally surveilled via spyware such as Pegasus, not to mention the infamous internal displacement, disappearance, and murder of hundreds of Mexican journalists. In this context, I actively sought to mitigate, as much as possible, the potential harm of research intervention in my participants’ lives by implementing an ethical strategy consisting of a procedural as well as a micro-ethics approach. The former included a series of everyday protocols to actively and carefully calibrate “risk assemblages” (McPherson 2018), be alert, and respond appropriately to adverse scenarios and unforeseen situations all throughout the research process. These protocols and action plans were discussed and refined in the Ethics and Risk Assessment approved by the Department of Sociology at the University of Cambridge in 2017. The micro-ethics part involved thinking and acting reflexively in relation to everyday “ethically important moments” in research practice (Guillemin and Gillam 2004:276) – such as consent, informed participation, and researcher-participant power dynamics – following general principles of non-maleficence, reciprocity, fairness, honesty, openness, and accountability.

The procedural part of the strategy was divided into physical and digital risks. In reality, risk was difficult to calibrate properly, especially because when I began this project, I knew only a couple of Mexican journalists and had no previous connection with the journalistic scene. This initial lack of a support network was an important element in my decision to limit my fieldtrips to other states of Mexico (where I had even less contacts) – a decision that I tried to compensate by other means and that, in hindsight, I still think was the right one. At the beginning of my fieldwork, I mainly focused on identifying and mitigating my vulnerabilities, because the levels of threat were not very clear. Therefore, I worked under the assumption that by getting involved with investigative journalists during fieldwork, as a researcher I could potentially share or become attached to this risk. On this matter, I followed the recommendations of the Centre for Investigative Journalism’s Handbook on Information Security for Journalists, which states: “if you are working with a high-risk source, such as an intelligence whistle-blower, that person may already be under surveillance. You should assume that the surveillance risk that applies to your source could also apply to you” (Carlo and Kamphuis 2016:17). I developed an on-the-ground monitoring strategy in which I

discussed an agreed itinerary for trips and interviews with my cousin, herself a well-connected journalist, and then checked in via text message and shared my GPS location at scheduled times. I also discussed this strategy and followed the advice of experts in Article 19-México, a human rights NGO specialising in the defence of freedom of expression, which helped me develop a case-by-case assessment and reduce my – at times – overestimated perception of risk. Personally, apart from navigating a megalopolis like Mexico City, I did not feel threatened or at high risk through my own work, and on-the-ground research was conducted smoothly.

Regarding digital risks, I sought advice from trusted friends at the Department of Computer Science and Technology at the University of Cambridge, who taught me how to implement protocols for digital security and data management by “normalising several permanent strategies that easily fit into your everyday work [...] and] employing case-by-case protection strategies” (Carlo and Kamphuis 2016, 7), according to how sensitive and vulnerable the topics and sources were. This included from strong passwords, frequent software updates, multifactor authentication, to encryption of my working and storage devices, backing up data on university servers, not to mention being constantly alert to phishing and doxing attacks, and using virtual private networks and secure (end-to-end) messaging services. Learning from the expertise of computer scientists helped me find a balance between productivity and safety, where stronger and more effortful InfoSec methods were not used all the time, but rather calibrated and used according to the level of sensitivity of the information I was collecting and the vulnerability of my participants. I learned this lesson the hard way, because even though these protocols helped me strengthen the security of my communications, data, and metadata, making them indecipherable, untraceable, and anonymous, it also added an extra layer of concentration, which led me on a couple of occasions to make mistakes, resulting in the loss of some data at the beginning of my fieldwork. Moreover, watching the wide range of journalists’ own security practices and opinions about this digital security/productivity trade-off prompted me to adapt and design a basic workshop on Infosec methods and tools for journalists, which, in a spirit of reciprocity and solidarity, I taught to my CIDE cohort, the MCCI newsroom and to journalists from different states of Mexico in the “CDMX Tech Camp” organised by the US Embassy in Mexico (Dec. 2017).

On the level of micro-ethics, the first steps consisted in elaborating a Participant Information Sheet and an Informed Consent Form (see Appendix 3), which were drafted in Spanish, and read and signed by all participants at the beginning of the first interview. The information sheet aimed “to explain in appropriate detail, and in terms meaningful to participants, what the research is about, who is undertaking and financing it, why it is being undertaken, and how it is to be disseminated and used” (British Sociological Association 2002). Specifically, the sheet informed the participants of the confidentiality of their data, their right to withdraw from the

study at any time up to the point of publication, without giving any reason, and their right to reject the use of data-gathering devices such as tape recorders. In fact, some interviewees simultaneously recorded or asked me later for a copy of their interviews. Furthermore, the consent form required interviewees to choose between four levels of anonymity (“not anonymous”, “anonymous for me, but not for my organisation”, “anonymous for my organisation, but not for me”, “anonymous for me and my organisation”). Most of the interviewees agreed to the sessions being recorded and chose the “not anonymous” option.

However, this indication of preferences was not a remedy for the complex and contextual dilemmas I faced during the writing-up of this thesis. Even though only on a handful of occasions did my interviewees ask to turn off the tape recorder and share information “off the record”, the core themes of our conversations revolved around reputational labels (like “novice” or “real” journalists), the gaps and disparities between the norm and practices, between discourse and everyday work, between public image and private accounts, between their editors’ orders and the reporters’ agency. As I argue in the other chapters, this was a rich terrain for studying practices that had a taboo or “deviant” character, or that were known by everyone in the guild, but only confided sotto voce. Nevertheless, using their accounts to problematise and deconstruct concepts like “professional” (/ism/isation), charged with virtuous allure, of course entailed reputational risks to participants, which I took very seriously and tried to mitigate.

Nevertheless, if my formal interviews had the advantage of having an informed consent form, for practical reasons this was not feasible for other types of data like my fieldnotes from public conferences, user-generated content, and open-source netnographic material. The problem with these public or quasi-public fora is that “content is generally published in informal spaces that users often perceive as private but may strictly speaking be publicly accessible. In any case, researchers are rarely the intended audience” (Association of Internet Researchers et al. 2020:69). Following *Internet Research: Ethical Guidelines 3.0.*, I adapted my research ethics to include a more relational and contextual approach to publicness, consent, and privacy, in contrast to a merely individualistic and static focus on “personally identifiable information”. I constructed an anonymisation ladder with different levels to categorise the material gathered according to the agreed terms under which the data were collected.

For my participant observation fieldnotes in newsrooms and in the Periodismo CIDE classroom I always presented myself on the first day to all the staff and students and briefly explained the aims of my study and the purpose of my visit and observations. Moreover, my presence in those spaces was in a way institutionally sanctioned by the chief editors and directors, although some teacher-journalists did include injunctions not to tweet or otherwise share sensitive information, which I observed in my writing-up. For the fieldnotes of relatively closed contexts

like invitation-only professional gatherings or closed-doors conferences, I only used direct quotes if the event was publicly live streamed and disseminated by the organisers (as was the case in Agenda de Periodistas or Zocalo FIL panels) with a clear intention to reach broad audiences and public consumption. The rest of the data from closed contexts was used for strictly background knowledge.

Regarding my use of Twitter, Facebook, and Whatsapp to monitor interactions between the different networks and the interactions of my participants with the journalistic community and professional chat groups, I did not use any direct quotes because even though at the time I was friended, followed, or invited to chat groups by users and group administrators knowing that I was a researcher, this by no means included people who joined these digital communities later. Due to the amount and the flow of conversations it was unfeasible to ask for consent at every given point from all participants. A similar thing happened with the open-source data I used as background research to prepare my interviews. I used these data to elaborate and tailor interview guides and not for analysis or direct quotes for two reasons. On the one hand, because I was aware that “digital data are never ‘raw’ but are always already ‘cooked’” and that using it for analytical writing required further reflection on the “possibilities of in-built biases, etc. in algorithms used for collection and analysis” (Association of Internet Researchers et al. 2020:69, 20). On the other hand, as preparatory background knowledge, there were several instances where this social media monitoring helped me to include these rich online discussions, conflicts, and controversies as part of my interview questionnaires. Directly asking my participants about these interactions had the advantage of giving them the opportunity and time to decide whether or not they wished to talk about these topics, in a more informed context.

Moreover, my other main concern was that the production of “special” assignments often involved a small number of people and so there was a risk that my participant’s true identities might be deduced from contextual details in the writing-up and publication stages of this dissertation. For this reason I decided to omit names and direct identifiers as a general rule, using instead more vague descriptors or systems of coding (like job title and numbers) to retain maximum content, although in some cases these indirect identifiers were also removed, particularly when considered in connection to each other (e.g., position title, description of organisation, location of employer, nature of involvement in the industry) (Thomson et al. 2005). Furthermore, after I left the field, whenever I had doubts, I contacted participants to double-check and clarify contextual details and parts of their interviews with them, to strengthen the fairness of their accounts and honour their trust in me and the study.

3. IMAGINARY REPORTERS: A HISTORICAL REVISION OF NEOLIBERAL AND NEOCOLONIAL PROFESSIONALISATION

3.1 INTRODUCTION

In August 2018, in the course of the interdisciplinary Seminar “Prensa y Poder” – organised by CIDE’s renowned postgraduate programme Journalism on Public Policy – I was involved in a heated public debate with a former editor-in-chief of *Reforma*, one of the most important national newspapers in Mexico. I was invited to present my preliminary findings on the collaborative networks, alliances, exchanges, and “competitor-colleague” relations (Tunstall 1971) I had observed and documented the previous year during fieldwork. To my surprise and fascination, this senior editor’s reaction turned out to be a defence at all costs of the culture of competition and a call for “greater appreciation for the soloist”. The editor dismissed collaborations and the collective dimension in journalism as the latest fad of niche and marginal media, which “lacked the force and impact” of the traditional mainstream media and could ultimately have a negative, homogenising effect. In contrast, for the editor, scoops and the golden rule of exclusivity were not only the motor behind innovation and the diversity of news, but part of the instinct of any true journalist:

for me, a journalist who aims to work collectively is not savouring it. [...] And I don’t think it’s right, this importance that you give to sharing information, we all enjoy getting an exclusive, your mouth practically waters, but I don’t share it before publishing, you know [...]. And if I get an exclusive tip and I start working on it, no way! As if, because we’re pals, I’m going to pass them on a tip, no way! Not at all!¹⁵

Even more revealing was the editor’s reaction when talking about other instances of daily reciprocity and recurrent sharing strategies among the reporters from competing media outlets whom I interviewed. For example, when confronted with the evidence in my presentation that some journalists develop on a regular basis a certain collegiality and favour-based systems for sharing news angles or audios, photographs, texts, videos, etc., if one was not able to attend an event, the senior editor judged this practice in moral terms as collusion and as one of the “veritable vices of the profession”.

It was at that moment that I began to realise there was a key distinction between what my participants told me in interviews and private conversations, and the harsh manner in which this former editor-in-chief – an elder of the tribe, if you wish – was performing a moral lesson in public, in a room full of journalists. It reminded me of a similar dynamic described by Malinowski in his study of the Trobriand Islands, and used by Howard Becker (1963) to explain the process by which

¹⁵ Fieldnotes from CIDE Seminar, 27th August 2018.

some practices come to be labelled and thought of by a social group as deviant, as the morally reprehensible act expected of an “outsider”. In his description, Malinowski points out that for the Trobrianders sexual endogamy was considered morally outrageous if it reached the eyes of “public opinion”, but in real life this practice was “by no means a rare occurrence” but something people knew, discussed, and were more lenient about:

if the affair is carried on *sub rosa* with a certain amount of decorum, and if no one in particular stirs up trouble, “public opinion” will gossip, but not demand any harsh punishment. If, on the contrary, scandal breaks out everyone turns against the guilty pair and by ostracism and insults one or the other may be driven to suicide. (Malinowski 1926:80)

Similarly, my participants talked about all kinds of anecdotes, gossip, and instances of competition, but also about all sorts of collective and collaborative practices, which, by digging further into the matter and collecting concrete pieces of information, I could see were by no means rare occurrences, although they were performed discretely, or sometimes (as in the case of sharing raw audiovisual inputs with competitors) even done behind the backs of their bosses and senior editors. On the contrary, in order to avoid the judgement of “public opinion”, this complex collaborative dimension – which I later discovered required a sophisticated system of trust, risk calibration, and reciprocity – was mostly invisible in public debates, for, as I described above, it was often treated with suspicion, if not reprimanded as unprofessional.

This contrast and tension between journalistic practice and the public representation of a professional ideal; between real life and imaginary reporters, triggered my curiosity and led me to ask: where does this professional taboo come from? How was this professional ideal created and enforced historically? Who can force these rules on others? What features does this professional ideal entail? Why is this identity and occupational culture so prone to competition and exclusion, while neglecting crucial aspects of everyday reporting? Why is it that academic research has also paid so little attention to this collaborative dimension, or even subscribed to labelling it as deviant?

To answer these questions, we need to go back to the 1990s discussion of what is known in the literature as the liberalisation or “*apertura*” (opening) of the Mexican press. This was a period of great enthusiasm in both academia and the industry, regarding the transformation and democratisation of the Mexican media – a period of “transition” when it was said that journalists in Mexico had begun to abandon the *ancien-régime* practices and were embarking on a process of professionalisation and free-market competition (those were the years of the North American Free Trade Agreement – NAFTA – commercial integration, and the first democratic elections in Mexico).

The more I dug in, I realised that in order to fully understand the Mexican “*apertura*” and its professionalisation project, I had to analyse how the Mexican media and journalists responded to the geopolitical realignments after the Cold War and the neoliberal turn. Moreover, the Mexican

case was part of a broader global debate on professionalism and media reform, which took place two decades earlier, in the late 1970s, around the New International Information Order (NIIO), in which Mexico played a key role. In those days, the discussion over the professionalisation of journalists was phrased in very different terms than it is today.

I begin this chapter by exploring the latter historical process and for that reason I ask the reader to be patient, for my analysis moves beyond the Mexican case and focuses on the global centres of production of what I call the neoliberal professionalisation project. In the second section I will return to examine how this project was adopted and adapted during the Mexican “*apertura*” in the 1990s and 2000s by the industry and by journalists in Mexico, whom I observed and interviewed in 2017-2018, and who remembered or had grown up in those years. Furthermore, this historic context is crucial for rethinking the theories and concepts mobilised by scholars at the time. Since then, these theories of professionalisation – which prioritise the study of exclusion and competition among territorial experts for control over a task or social problem – have long dominated media studies and the sociology of news and journalism. My findings challenge these theories. Using the case of the journalistic world, I argue more broadly that in order to fully understand practices of collaboration and interdisciplinarity among institutions of knowledge and cultural production, we need a paradigm shift. Instead of focusing exclusively on how professions enforce mutual boundaries and battle for authority, I argue for highlighting the existence of that other half of the journalistic world, full of overlapping practices, liminal interspaces, and efforts at cooperation.

3.2 IMAGINING A NEW WORLD ORDER

In the late 1970s, in the midst of the PRI’s *ancien régime*, Mexican journalists took part in a larger global debate inspired by the spirit of decolonial self-determination behind the Non-Aligned Movement (NAM). This critique of neocolonial domination and “Third World” dependency was famously crystallised in the Bandung Conference in April 1955 (Chakrabarty 2011) and developed throughout the 1970s, culminating in the programme for the New International Economic Order (NIEO).

This political climate also set in motion – most prominently between 1973 and 1980 – the agenda for the NIIO, later renamed as the New World Information and Communication Order. Similar to the NIEO, the basic idea behind the NIIO was that global flows of information and communication were deeply unequal, especially for “developing” countries. These imbalances were the result of what NIIO advocates signalled as the increasingly monopolistic concentration of media ownership, infrastructures and technology among a handful of transnational corporations from Western, former colonial powers. For members of the Non-Aligned Movement, those disparities and market distortions worked against their national sovereignty and cultural diversity,

because, unlike any other global industry, it was acknowledged that communications and the media had the symbolic power to influence politics and culture.

They therefore underlined the need for international responsibility and cooperation that could reverse these inequalities in favour of the “Third World”, and support their call for a new paradigm in which the public dimensions of communication and information were to be promoted and protected through various mechanisms, involving State intervention and multilateral regulation.

In particular, Latin America had a very active role in the formulation of the NIIO programme. As historian Vanessa Freije recounts, there were already important precedents of South-South cooperation and regional news exchange initiatives: notably, the Non-Aligned News Agency pool, the Caribbean News Agency, and Cuba’s news services, like *Prensa Latina* or *Radio Havana*, which established exchange agreements with their Asian and African counterparts, particularly from Egypt, Algeria, Yugoslavia, and Vietnam (Freije 2019:304–5). Moreover, Latin America hosted key intergovernmental conferences, symposia, and experts’ meetings organised by the United Nations Educational, Scientific and Cultural Organisation (UNESCO) in Bogotá (1974), Quito (1975), and San José, Costa Rica (1976). These were in preparation for the UNESCO’s 19th General Conference in Nairobi, where the Commission for the Study of Communication Problems was created and would go on to produce the famous MacBride report, which I analyse in further detail below.

Geopolitically, for Mexico those were years of “relative independence” regarding the country’s relations with its powerful neighbour, the United States (Ojeda 1976), enabled by a combination of factors, from Mexico’s rise as an oil exporting country in the midst of repeated OPEC oil crises, to a finely tuned diplomatic equilibrium. Indeed, in the context of the Cold War, Mexico had room for manoeuvre in supporting Non-Aligned dissent, maintaining its nationalist rhetoric and pursuing a more protagonistic foreign policy in the region, in exchange for its distance from the USSR and domestic suppression of the political left (Toro 2018), of which Luis Echeverría’s presidency (1970-1976) is the classic example. Following Freije, “Mexico City became the principle staging ground for NIIO advocacy [in Latin America...]. The city served as the regional headquarters for Third Worldist institutes,¹⁶ news publications, wire services, and journalist associations, and became home to hundreds of exiled reporters and intellectuals” (Freije 2019:302).

¹⁶ Notably the Latin American Institute for Transnational Studies (ILET).

All the political and intellectual energy that gathered around NAM hubs like Mexico City collided with the doctrines of “free trade” and “free flow of information”, and this build-up of tension was palpable in political speeches, news editorials, diplomatic letters, and the hallways of international forums. Of course, it was also palpable in 1980, when *Many Voices, One World* (also known as the UNESCO MacBride report) was finally published.¹⁷ This document condensed that atmosphere.

As a document trying to build some form of consensus amidst the Cold War’s “divisive atmosphere” and “strident confrontation” (UNESCO 1980:xvii), the MacBride report is distinguished by its cautious, negotiated, and preliminary character. In a very short time (two months of work spread across eight sessions,¹⁸ over two years), the report was meant to produce a first take on the longer endeavour of studying “the totality of communication problems in modern societies” and articulating the “many varying views as to the meaning of the ‘New Order’ and as to what it should encompass” (ibid.:xviii). Inevitably, the result was an approximative and unsystematic effort,¹⁹ which nonetheless constituted a radical normative shift. Indeed, as Freije points out, the NIIO drafted in the MacBride report “fundamentally challenged North Atlantic doctrine by asserting that open markets did not produce democratic or even truthful information. Proponents did not seek informational autarky, but rather to be equal participants in an alternative form of globalization rooted in national sovereignty” (2019:303).

The report dared to suggest, as circumspectly and timidly as possible, that “*some* restrictions on the process of resource concentration *may be* in the public interest” and “that *some* norms, guidelines or codes of conduct for transnational corporations’ activities in the field of communication *might* well be developed to help ensure their operations do not neglect or are not detrimental to the national objectives and socio-cultural values of host countries”²⁰ (UNESCO 1980:111). Among its *nonbinding* recommendations were policy instruments to reverse inequality and regulate the market: taxing commercial advertising, differential pricing, preferential tariffs and rates; reforming existing patent laws to counteract the concentration of technology and promoting technology exchange from “developed” to “developing” countries; reforming antimonopoly laws; using public funds and subsidies to promote national and regional news agencies, prioritising non-commercial, rural, and communitarian forms of cultural and educative mass communication; stricter compliance criteria and greater public access to records of transnational corporations; as

¹⁷ That same year the report was published in Spanish by the publicly funded Mexican publishing house Fondo de Cultura Económica, which reprinted a shortened version in 1987 and 1993.

¹⁸ Three of them were held in NAM countries: Acapulco (Mexico), Dubrovnik (Yugoslavia), and New Delhi (India).

¹⁹ This aspect manifests itself in the report’s often pastiche-like writing and the numerous dissenting comments and rectifications made by the 16 members of the Commission in footnotes and annexes.

²⁰ My italics.

well as promoting redistributive financial support to reduce the concentration of media ownership and strengthen editorial independence.

Apart from what we can call the “political economy component”, the other main concern of the report was the professionalisation of journalists. The recommendations included measures like raising standards and quality through “broad educational preparation and specific professional training” so that journalists could be socially acknowledged and “treated as [genuine] professionals” (ibid.:262). However, controversy emerged in trying to determine whether professional journalists required a special status entitling them to protection and guarantees, but also as to the obligations and regulations for ensuring the professional integrity and accountability not only of journalists, but of media institutions, owners, and managers – since it was asserted that “freedom without responsibility invites distortions and other abuses” (ibid.:261). For this reason, the report was very cautious and warned explicitly against the risk of introducing any kind of official licensing, which meant avoiding governmental mechanisms of control, but which also meant no special protection for journalists, apart from “the same range of human rights as other citizens”,²¹ and no labour guarantees (salaries, allowances, indemnities, security of employment, etc.), which were left to “the result of collective bargaining between trade unions and management” (ibid.:237, 246, 264). Nevertheless, the report proposed an array of voluntary self-regulatory and self-disciplinary “ways by which the right to assess mass media performance can be exercised by the public”: from establishing media councils, the ombudsman figure, and peer-group courts of honour, to the involvement of the lay community in governing boards, internal codes of professional ethics, and developing an international convention for the right of reply and correction (ibid.:262–64).

3.2.1 THE WESTERN OFFENSIVE

The NIIO ended before it even got started. The MacBride report was meant to be the start of further study and decision-making “with the good will governing future dialogues” (UNESCO 1980:xviii). Instead, it marked an abrupt end to the discussion and remained the swan-song for the communication world vision behind the Non-Aligned Movement.

There were several fronts of overt opposition throughout. First, very early on in the mid-1970s, international associations of media owners from the United States, Latin America and West Europe, such as the InterAmerican Association of Broadcasters (AIR-IAB), the InterAmerican Press Association (SIP-IAPA), and the International Press Institute (IPI), as well as some of the so-called Big Four news agencies – Associated Press, United Press International (UPI), Agence

²¹ A point that was emphatically opposed in annexed comments and footnotes by Seán MacBride, the president of the Commission.

France Presse and Reuters – started to frame the MacBride report’s recommendations as antidemocratic, and a threat to free trade and press freedom. In the words of William J. Small, a former president of UPI, “UNESCO positions in communications have seemed designed to eliminate both the outside observers [...] and to eliminate the opportunity for the press at home to function freely and fully. [...] They] have the potential to do further damage [...] even to the point of killing free speech” (1984:157).

This corporate opposition crystallised in May 1981 in the Declaration of Talloires (France), which was announced during the “Voices of Freedom” conference, organised by the World Press Freedom Committee.²² The Declaration encapsulated the strategy used to discredit the UNESCO and the NIIO, as well as the language and common sense that would dominate in the decades to come. All mention of media concentration or market inequalities were omitted and instead the focus was on “abandon[ing] attempts to regulate news content and formulate new rules for the press”, since any such proposal, apart from “the free exchange of ideas”, was considered tantamount to censorship, licensing, and arbitrary official control in disguise – a hidden agenda imposed by governments in the name of “special protection” and “responsibility”. The Declaration also articulated a mistrust of any social or public logic of the State, which, it was said, only “exist[ed] for the individual and ha[d] a duty to uphold individual rights” (AP 1981). Instead of the “recrimination” and “pessimism” of the NIIO, the Talloires signatories called for positive “practical solutions” like eliminating economic *barriers*, sponsoring new technological progress, more equipment and, most importantly, an individualistic *professionalisation project*: “we believe that the ultimate definition of a free press lies not in the actions of governments or international bodies, but rather in the professionalism, vigor and courage of individual journalists” (AP 1981).

A second front of opposition to the NIIO had to do with the bipolar politics of the Cold War and the rise of neoliberal governments. In September 1981, Talloires lobbyists received strong support from President Reagan, who praised the Declaration “issued by independent media leaders” as an example to all nations. He also instructed the immediate withholding of US funds from UNESCO for what he called attacks by silencing voices, licensing, and press restrictions. In October, Vice-president Bush took a trip to Latin America and, in Rio de Janeiro, before the Inter-American Press Association (SIP-IAPA), declared that the United States was “dead set against” the UNESCO proposals, for they were “direct assaults on our own freedom of the press” and “censorship by another name”, put forward in the interest of the “unfortunately numerous

²² A Washington-based think tank in overt opposition to the NIIO, which was created in 1976 and later merged with Freedom House in 2009.

totalitarian countries on Earth” such as Cuba and the Soviet Union (USA Department of State 1984a:409–10).

3.2.2 “INJURIOUS NAMING”

A third front was held by think-tanks and the creation of international indicators for labelling and ranking countries through “the politics of rating freedom” (Bush 2017). The most blatant and hard-line example of this strategy was the US-based Freedom House and its “Freedom in the World” index. Published in 1973 (the same year as the NAM’s Algiers declaration of a new economic order) this numerical index was used to classify polities into three categories: “free”, “partly free”, and “not free”. Since then, considerable academic critiques have questioned the index’s methodological shortcomings. For instance, the original survey was unsystematic, to say the least, and relied very heavily upon US State Department reports, as well as encyclopaedias and the “hunches and impressions” of a single academic, Raymond Gastil, who, after leaving Freedom House, admitted the index was a “loose, intuitive rating system” (Bradley 2015:36; Zerndt 2016:208–16). Furthermore, even nowadays, the survey’s basic information such as its sampling method, in-detail questionnaires, scorecards, scorer’s identities, etc., remain a mystery. Following Bradley, “it remains difficult at best to understand, critique, or falsify any of the survey’s ‘findings’ [...]. In a sense, the supposedly increased transparency amounts simply to one black box being replaced by several layers of smaller black boxes. The smaller boxes still hold their secrets well sealed inside; it still remains virtually impossible to understand the actual basis of, or assess the accuracy of, any rating” (2015:38).

Despite all these weaknesses, the “Freedom in the World” index was instrumental in allowing Freedom House’s then director, Leonard Sussman, to become one of the most critical voices against the NIIO, and eventually be appointed as the US representative to UNESCO in 1983. Sussman presented his “flagship” index in Congressional committees and mainstream media as an independent, unbiased benchmark, whose state-of-the-art, comparative, quantitative findings could function as a compass for US foreign policy decision-making, from international aid to national security.

In fact, since the 1970s such “pro-democracy” lobbying and indicators have become, and continue to be, very effective as instruments of power. For instance, the Freedom in the World index gained political traction as a reputable source of knowledge and has been increasingly used as a focal point for news articles, activism, educational curriculums, academic theorising, and diplomatic and legislative decision-making (Bush 2017:717–18). From the 1980s to this day, it has also allowed Freedom House to increase fourteenfold its funding from the US government, which

constitutes on average over 80% of the NGO's overall budget (Bradley 2015:44; Bush 2017:720; Zerndt 2016:226–27).

Ironically, think-tanks like Sussman's Freedom House joined Western media corporations and neoliberal governments in denouncing the NIIO's hidden agenda of state control. This is a strategy that we could call, paraphrasing Susan Benson, "injurious naming": a "quintessential social act [...] integral to the practice of domination [where] each communication thus effect[s] a tyrannous act of interpellation", so that the dominated "were literally made to 'answer to' names that in and of themselves indicated their subjection" (Benson 2006:180, 184). Benson's work focuses on colonialism and slavery, but I argue that her concept highlights precisely the implicit neocoloniality signalled in the 1970s by the NAM's critique, and subsequently reelaborated decades later by postcolonial studies. After all, names are indeed connotative, which is to say, the antithesis of "freedom" is not a low numerical score, but subjugation and slavery. I will return to this dimension at the end of this chapter.

Similarly, by claiming the right to divide the world between "free" and "unfree" countries, as early as in 1976 Sussman used the Latin American stage of the UNESCO conference in San José to interpellate "the large majority of member nations in UNESCO" supporting the NIIO as a "Soviet-led move" "to justify their own use of thought-control" (Kihss 1976). Sussman was consulted by the MacBride Commission and, in a classic example of what Stuart Hall (2019) calls "the West and the Rest" mentality, he urged for "two distinct sets of standards and objectives": one for "government-controlled", "communications-poor countries"; and another for countries that were "communications-rich (generally now free of governmental control)" (Sussman 1984:163). This involved the separation between the *real* needs of "moderate developing countries" – which Sussman's index graciously rewarded with a "partly free" rating – and the "purely ideological exploitation" of "Soviet-bloc and third-world Marxist countries" (Sussman 1981). The index was summarised in a "Map of Freedom", shown in Figure 3.1, coloured-coded in green ("free"), yellow ("partly free") and red ("not free").

Once again, individual *professionalisation* and technological solutions were key elements of the opposition's counterarguments against the NIIO: the UNESCO had fallen victim to "ideologisers" and needed to "transfer technology – not ideology", for what really was needed was "improving international journalism, not creating some 'new order'" aimed at the regulation of structural inequalities and market concentration. If not, the United States would need to lead the "Western retaliation", which meant "free" "Western governments and commercial industry" creating aid programmes "outside UNESCO" "for those developing countries – the moderates – that will expand the free flow of information" (Sussman 1981).



Figure 3.2: Leonard Sussman in front of a six-metre long Map of Freedom, displayed at Freedom House's New York headquarters (Source: Freedom House, 1972)

3.2.3 (DE)POLITICISATION

This opposition was a success, for the debate around the NIIO ended up being irrevocably reduced to just another bipolar Cold War affair. The Reagan administration's "retaliation" escalated into the United States' withdrawal from the UNESCO in 1984, adducing "UNESCO's mismanagement, inefficiency, and hostility towards the West" by way of explanation (U.S.A. Department of State 1984b:90). This was a huge blow and signalled the drastic reduction of the UNESCO's annual budget by over a quarter. In the official withdrawal letter, US Secretary of State George Shultz phrased the irreconcilable differences with the multilateral organisation in very particular terms, talking about the "injection of political goals" and "ideological emphasis", which made the UNESCO a "servant" of "the political purposes of member states, rather than [its] international vocation"²³ (1984:83–84). Moreover, in its press release, the US State Department further elaborated its position and made it clear that the key problem was that the UNESCO "continue[d] to press for a so-called New World Information and Communications Order, which embodie[d] elements threatening to a free press and a free market". For the United States, these "anti-Western"

²³ Let's remember that the "developing" countries supporting NIIO had a broad voting majority in the UNESCO.

“vitriolic attacks” of an “anti-free press nature” went beyond the UNESCO’s “competent work in technical fields” and instead made it “a comfortable home for statist, collectivist solutions to world problems and for ideological polemics” (U.S.A. Department of State 1984b:89).

The United States’ alternative strategy to “carry on the fight” outside the UNESCO involved reorienting development aid for Third World communications through bilateral cooperation, particularly between the United States Agency for International Development (USAID) and the United States Information Agency (USIA) and the private sector. The main actors in this realignment were not states, but so-called civil society groups, most of them gathered around the Talloires declaration: a growing number of American nongovernmental organisations, professional media associations, universities, telecommunications corporations, and private foundations.²⁴ Furthermore, at the core of this aid programme was a fixation with technical and individual problems, rather than structural ones, which is why the only acceptable solutions – framed as neutral or “depoliticised” – were professionalising ones, so that “all the projects [the United States was] funding or [would] contemplate funding [were] related to training” (ibid.:91). Secretary Schultz said it clearly: the United States will follow “the principle that a few things done well have more impact than a superficial examination of all the world’s ills” (1984:84). Of course, bilateral aid was conditional upon “developing” countries adopting the right political stand, which is why the US withdrawal statement ended with a veiled threat:

Third World countries are not about to be manipulated by the Soviets. They know that their hopes for communications development assistance lie with the industrialized countries – especially the United States – so anti-free press, anti-free market moves are counter-productive. They are also aware that such moves in UNESCO will affect U.S. attitudes about where and how it will support future assistance for developing countries. (U.S.A. Department of State 1984b:92)

One year later, Margaret Thatcher’s government followed the United States by withdrawing from the UNESCO, despite numerous diplomatic statements in support of remaining from most members of the European Economic Community and 41 countries of the Commonwealth. This represented an additional 8% budgetary cut for the UN agency. Similar to the US reaction, the United Kingdom’s official statement emphasised bureaucratic inefficiency. The then Foreign Secretary, Geoffrey Howe, expressed the government’s dissatisfaction with the UNESCO as a case of low “value for money” for the United Kingdom and developing world (Hansard HC Deb 1984:c.427). Moreover, the Minister for Overseas Development, Timothy Raison, elaborated

²⁴ In particular, the US Department of State briefing mentions a few of these organisations as leading the charge: the World Press Freedom Committee, the Inter-American Press Association, the International Press Institute, the International Federation of Newspaper Publishers, American Society of Newspaper Editors, American Newspaper Publishers Association, American Press Institute, Control Data, Communications Satellite Corporation, International Free Press Development Fellowships, Asia Foundation and Associated Press (USA Department of State 1984b:90–92).

further on the “problems of inefficiency, over-politicisation and obscure programming” of a “slow-moving, over-centralised, top-heavy administration”, which made UNESCO a “forum for the propagation of ideas repugnant to the people of this country” and “a medium for Communist rhetoric” (Hansard HC Deb 1985:c.517). In particular, the NIIO drafted in the MacBride report was again the key issue, for it “posed a threat to the freedom of the press because it could be used to justify rigid government controls in the name of producing a balanced flow of information” (ibid.:c.517). For the Conservative government there was no value for money in the UNESCO’s “studies on the social and cultural dimensions of world problems or on the relationship between access and participation in the interest of the democratisation of communication – an apparently harmless phrase which can be used to justify activities which are far from democratic”; instead, the UNESCO should focus on good value for money and depoliticised “practical activities” like training, literacy, teaching materials, and the preservation of monuments and museums (ibid.:c.518). Again, bilateral aid was redirected via the British Council at the same time that budget cuts were announced for the BBC’s overseas services.

This antipolitical rhetoric, which is so distinctive of neoliberal governments, did not go unnoticed. In the House of Commons debate, Labour MP for Chesterfield Tony Benn critiqued how “the theory of non-political politics [was] peculiar to the Conservative party” who mobilised it as an effective symbolic boundary, used, ironically, to discredit political opponents and give an aura of neutrality to one’s decisions: “the Foreign Office think that if an international body passes a resolution that is unacceptable to the Conservative party, that is political, and if it is acceptable, it is non-political” (Hansard HC Deb 1985:c.543).²⁵ Even political figures such as former Prime Minister and Tory grandee Edward Heath considered the UNESCO’s “politicisation” as an unacceptable argument for withdrawal, for it was inherent to public decisions and inextricable from any work of political representation – parliamentary, diplomatic, etc:

there is “politicisation”, to use a word as bad as “privatization”, but we ourselves politicise. Of course, we do. Whenever we take an attitude towards human rights, we politicise. Politicisation exists because representation in UNESCO is by Governments, not by individuals or by representatives of learned societies. (ibid.:c.534)

Heath’s critique of the US and UK governments’ discrediting of the UNESCO and the NIIO – something he called “a grave error that will have dangerous consequences” – gives an illustrative vignette of the turning point in the political culture of those years and the arrival of the

²⁵ Benn explained this antipolitical style with an everyday anecdote, which I find revealing: “On one occasion when I was canvassing, a lady came to the door and said, ‘We are all non-political here. We vote Conservative.’ That is an old joke, but it is true” (idem).

neoliberal consensus. Contrary to the Thatcher or Reagan administrations, Heath acknowledged as legitimate the recently independent “developing world’s” desire to exert its influence in multilateral forums and push for an NIIO and an NIEO, “for the simple reason that it believes that it gets a rough deal [and] today it has only minute representation compared with what many of the countries are entitled to [...]. It does not want charity or aid [...]. It wants the establishment of an international order that will give it a fair deal with the developed world” (Hansard HC Deb 1985:c.533).

3.2.4 THE NIIO’S LIMITATIONS

As Seán MacBride himself reflected in his later years, the opposition’s campaign against the UNESCO and the NIIO, was “reminiscent of McCarthyism” and its Cold War reductionism managed to prevent any further serious dialogue on the matter (Díez 2005:139). Of course, reality was far messier than the clear-cut dichotomies of North-South; West-East; developed-developing; foreign-national; imperialist-communist. In all fairness, the NIIO advocacy was not exempt from limitations and inner divisions, which in the end contributed to its incapacity to reach a consensus or even an operative definition of what the “new order” should encompass in practice.

As heir to the legacy of Bandung, the NIIO had at its core what Dipesh Chakrabarty calls a “pedagogical” style of decolonial politics, referring to its developmentalist bent which “displayed an uncritical emphasis on modernization” and “a clear and conscious desire to ‘catch up’ with the West” (2011:221). Hence the stellar role that the NAM and the MacBride report gave to newswire agencies and the need to create national and regional versions of them. These were seen as the global platform for reporting not only the crises and calamities of the Third World, but for producing fair media coverage that could “support development action”, protect these nations’ “cultural identities”, and show the world their achievements – that civilisational pride implicit in nationalism. It is no coincidence that Notimex, the Mexican public newswire agency, was created in August 1968, in the context of the international Olympic Games, which were hosted by Mexico that year.

Furthermore, NIIO advocates formed a coalition of convergent, but not identical factions. In the case of Latin America, it was the 1970s experience of South American military coups, exile, and state repression that highlighted the vulnerabilities within the movement. Silenced and persecuted in the midst of the dirty wars, for the exiled intelligentsia congregated in Mexico City the power relations between media and State were more problematic. This mistrust in repressive governments, but also in political and public interventions as a whole, was heard in legitimate dissonances from parts of the left regarding the State’s role in the NIIO. This highlighted that “mobilizing as the Global South was a useful strategy, but it fell short of explaining how domestic

politics and discrimination contributed to inequalities at home” (Freije 2019:312). The dissenting Latin American exiles distanced themselves from the NIIO and instead proposed a strategy which prioritised domestic democratisation over international inequality; civil society over states in multilateral forums; national politics over South-South cooperation; incremental support of “alternative” grassroots media over more radical changes to corporate concentration (Freije 2019:318–19).

There was also dissonance between the rhetoric and the actions taken by governments supporting the NIIO, which eroded its credibility. Mexico is a good example of this. With the protagonistic Third-Worldism of President Echeverría came his famous shutdown of *Excelsior*. His successor, President López-Portillo, also adopted the terminology and discourse of the NIEO and NIIO. From 21st February to 6th August 1980 – the same year that the MacBride report was presented in Belgrade – there were public hearings and debates in the Mexican Congress on the lack of procedural rules for article 6 of the Constitution, concerning the operative definition of the “right to information” and the regulation of radio and television concessions. The discussion was marked by an absence of feasible proposals from the left – led by the Mexican Communist Party, with the Confederation of Mexican Workers (CTM), and pro-regime Mexican Labour Federation – as well as intense opposition and lobbying from major media corporations, led by Televisa, the pro-regime monopolistic TV broadcaster. Eventually, the rhetoric of the López-Portillo administration ended months later, after the signing of two agreements to expand Televisa’s satellite infrastructure in the territory and its monopoly concession into cable subscriptions and over-the-air television (Fernández Christlieb 1980b, 1980a). Examples like this show the challenges and contradictions that NIIO advocates faced and were unable to overcome, as well as the enormous political work needed to negotiate and legitimise a redistributive and regulatory media policy sophisticated enough to deal with the ever-present tension between the powers of the market and the State.

3.2.5 THE NIIO’S CONTRIBUTION

Despite these limitations, revisiting the NIIO and the MacBride report gives us a glimpse into a radical vision of a world upside-down, especially for post-Cold War generations like mine. Simultaneously, its abrupt interruption is a glimpse into our present: into the grave consequences of the neoliberal consensus, which for decades were hardly contested or even discussed with comparable vocabulary and assertiveness until fairly recently, only after the post-2008 “crisis of journalism” and only thanks to the new activism behind the coalitions for media reform (Fenton 2016).

True, the NIIO drafted in the report “is not, could not be, nor did it pretend to be a magic formula to save our soul, but rather an inner compass”, as writer and journalist Gabriel García Márquez²⁶ recalled from his participation as one of the 16 members of the MacBride Commission (1980). Nevertheless, its élan of emancipation, outward-looking dialogue, and diversity of voices went beyond the logics of nativism and retaliation; paraphrasing Chakrabarty it was “no longer a matter of the colonized Caliban talking back to Prospero, the master” (2011:217). Instead, its contributions lay in denaturalising the structural inequalities and potency of the “free flow of information” doctrine, and highlighting “that the struggle over knowledge production was central to advocacy for an equitable, postcolonial international system” (Freije 2019:303).

The epilogue of this enthusiasm for the NIIO was further deregulation, inequality and a worldwide sustained concentration of media (MRC 2015, 2019; Noam 2016). Moreover, in 1987 came a reorientation of the UNESCO, which drew closer to the Talloires Declaration’s ideal: a “depoliticised” forum for technical/technological solutions and professional training (De Moragas et al. 2005:10). This techno-optimism and “depoliticisation” was also present in the bilateral programmes for international aid implemented by the United States and United Kingdom after their withdrawal. It is no coincidence that in the postscriptum comments to the MacBride report, the two Latin American members of the MacBride Commission, García Márquez and Juan Somavía, director of the ILET, spotted and were very critical of these trends:

it is not possible to solve contemporary communication problems through money and training alone. The idea of a “Marshall Plan” for the development of third world communications is inappropriate and will tend to reproduce Western values and transnational interests in third world societies [...]. There is a tendency in different parts of the report to “glorify” technological solutions to contemporary communication problems. We want to emphasize that the “technological promise” is neither neutral nor value-free. Decisions in this field have enormous political and social implications. (UNESCO 1980:281)

The end of the Cold War, the “promise” of the digital revolution as “liberation technology” (Curran et al. 2012; McPherson 2017), the geopolitical realignments of globalisation, and the economic crisis and liberalisation of 1980s–90s meant a reduced margin of manoeuvre for former Non-Aligned countries and advocates. All of this “quieted global debates about private interests governing media” (Freije 2019:303).

3.3 A NEOLIBERAL PROFESSIONALISATION

At the heart of the triumphant neoliberal paradigm was a professionalisation project and a particular interpretation of what professionalism meant and could do to advance the “free flow of information”. The purpose of this historical contextualisation is to make it clear to the reader that

²⁶ My translation. A decade later, in 1994, García Márquez created the Foundation for New Ibero-American Journalism (FNPI), to this day one of the most important networks of journalists in Latin America.

the professionalisation of journalists was not merely an effective rhetorical device, but one with deep conceptual and political implications.

3.3.1 STRUCTURAL-INDIVIDUAL

First, by conceptualising the problem of a free press as a matter of (in)adequate training, “professionalism, vigor and courage of individual journalists” – to use the words of the Talloires Declaration – the neoliberal project downplayed or entirely omitted the structural inequalities and power asymmetries existent in capitalist media systems. If there were no such things as societal problems, only more or less professionalised individual practitioners, then “a new information order is not needed [but] better journalism always is” (Sussman 1981). Also, this meant creating an artificial separation between the political economy of the media and journalistic practice – as if they were separate things and not inextricably related. Thus, under its freedom-coercion dichotomy, the political economy could neither be regulated nor reformed, at the risk of contravening the free flow in the marketplace of information. If structural change – a new order – was unacceptable to media owners, and regulation of corporations bypassed, what remained was an obsession with the merits and professionalism of reporters – what I have characterised as the fetishisation of professionalism – as the only noninterventionist solution. It is a classic case of changing all things individual so that everything structural may remain the same. The problem is that in reality this separation is impossible. One simply cannot empower journalists as media workers without affecting corporate interests; without reforming labour legislation which promotes outsourcing, flexibilisation, and job precarity, or prevents collective bargaining and the political organisation of journalists. Professional journalists cannot practice freedom of speech fully when increasing chain ownership limits the diversity of potential employers, or when high entry costs and the lack of subsidies make it very difficult for journalists to create their own media projects. One cannot strengthen journalists’ autonomy and independence without affecting the hierarchies and power relations *within* the media. One simply cannot aspire to “a public service orientation, but not the framework of public regulation underpinning it” (Curran and Seaton 2009:338).

3.3.2 PRIVATE-PUBLIC

Secondly, behind its antipolitical rhetoric and the preference for “depoliticised”, “value-for-money” private solutions – training, equipment, philanthropy – the neoliberal interpretation of professionalisation meant, conceptually, a mistrust based on the artificial merging of the notion of public interest with state authoritarianism. Moreover, making them look indistinguishable was part of the innovativeness and political effectiveness of this project. As discussed earlier, regulatory and redistributive public interventions such as progressive taxing of advertising, subsidies for

journalistic innovation, preferential tariffs, and public funding for non-commercial communication were all regarded, negatively, as statist and collectivistic, as ultimately a gateway to totalitarianism, to the gulag. In reality, what all these policies have in common is that they need and indeed try to articulate a definition of public interest; they need to negotiate politically and publicly their criteria (often phrased in terms of educational, social, cultural, local, and rural goals) and why these make such interventions legitimate and desirable for society. This is not to say that defining public interest is in itself neutral or exempt from power struggles, nor is it to diminish how fine-tuned and complex (although certainly not unattainable) media regulation and policy are. As I mentioned above, regarding the division within the NIIO coalition, the long history of censorship and repression exerted by states is a reason to remain vigilant, but this should not prevent us from distinguishing key differences between the tactics of a given political regime or its tensions with the press, and the legitimacy of public logic.

On the other hand, under the “free flow of information” doctrine, the private sector was the only haven for journalism. As US commissioner for the MacBride report and professor of communication at Stanford Elie Abel sustained, there was no evidence “in support of the notion that market and commercial considerations necessarily exert a negative effect upon communication flows” (UNESCO 1980:(1), 260). On the contrary, “courageous investigative journalism” could “be sustained only by independent media whose survival depends upon their acceptance in the marketplace, rather than the favors of political leaders” (idem). In contrast, from this position there was no room for either public media or regulation, since “where the press is an arm of the state, there can be no room for the exercise of independent professional judgment by journalists” (UNESCO 1980:(2), 244). This of course is an oversimplification. First, because it neglects positive experiences of public media, such as public radio or public television. And secondly, because we know – thanks to growing evidence from pioneering by scholars like Jane Curry (1990) and Natalia Roudakova (2017) – that even in the media systems of the former Soviet bloc there was room for professional identity, ethics, and solidarity among journalists. Journalists were party bureaucrats, and yet they still monitored and pushed back against political decisions. Daily news reporting as we know it in the West was almost nonexistent, but still journalists published investigative pieces in the form of long, nonfictional essays (*ocherki*); they established trust with their audiences and functioned as mediators – as representatives – of local grievances. In sum, the neoliberal professionalisation of journalists was conceived as part of a wider project in which commercialism and private enterprise were a *sine qua non* requisite for independence. Similarly, in the absence of public interventions that could prevent market imbalances and inequalities, the response to these contradictions was to focus on individual autonomy, civic convictions, and the self-restraint of journalists as the only acceptable regulations for the marketplace of ideas. Professionalising became

“in practice, a way of re-legitimizing the market system” by promoting “the ideals of social responsibility and objective journalism among journalists as a way of ensuring that the press serves the public [...] as a way of mitigating the consequences of increasing press concentration and monopoly” (Curran and Seaton 2009:332).

3.3.3 NEGLECTING THE SYMBOLIC

Another direct consequence of this doctrine was to exclude and remove from professionalisation processes any consideration of the responsibilities of journalists or the special protections needed in the light of increasing anti-press violence. In fact, the Talloires Declaration, backed by the US Department of State, always referred to these two key aspects of journalistic practice in quotation marks, as if to cast doubts about ulterior motives and treat them as a cover for state control and licensing, rather than legitimate topics for reform (see section 3.2.1). Conceptually, journalists could not be given special protections and guarantees (like those granted to diplomats or doctors) because their work was not considered a public service, but a commodity devoid of any symbolic or political power. Yes, there were dangers and risks involved in producing news, but that was an occupational hazard like in any other industry, which ought to be bargained over in private contracts between (increasingly de-unionised) workers and management.

Furthermore, the neoliberal project meant avoiding and derailing any serious discussion of media accountability and obligations: it was a case of “power without responsibility” (Curran and Seaton 2009). As we mentioned above, this was evident in the opposition to the NIIO’s proposal for international regulation regarding codes of ethics, independent media councils, and the right to reply. From this hands-off perspective, if any such regulations were ultimately equated to state censorship, what was left was the illusion of customer sovereignty and market *competition*. This entailed the assumption that, in a competitive market, audiences themselves could detect and judge irresponsibility in news or punish media abuses of power by simply choosing to buy other content. This of course is an oversimplification, because not everyone can compete (especially in a world of increasing media concentration); buyers’ choices do not come with perfect information nor do they promote diversity per se. Moreover, political representation is far more complex than sales and ratings, just as corporate accountability goes beyond customer complaints services. Following James Curran:

this ignores the privileged position of capital in the seemingly open contest of the free market, and overlooks evidence that the press has long been more right-wing than the public it is supposed to represent. The traditional liberal approach often also views the press as the principal intermediary between the state and public within an archaic conception of polity. This disregards the organizations of civil society which are the main agencies through which public concerns are represented [...]. In short, competition – the *deus ex machina* of liberal theory which makes the consumer “sovereign” and proprietors accountable – had been seriously eroded. (2003:342,346)

The consequences of this include a long list of unchecked media abuses of which the Leveson inquiry in the United Kingdom is one of most recent examples (Fenton 2016), as well as the erosion of public trust in the media and even further deregulation. For instance, the same year in which the United States withdrew from the UNESCO, the Reagan administration repealed the Fairness Doctrine, which required licensed broadcasters to give equal airtime to opposing points of view upon controversial issues. At the time, Chairman of the Federal Communications Commission (FCC) and former communications adviser in Reagan's presidential campaign Mark S. Fowler explained there was no reason for special regulations because broadcasting – and television in particular – was “just another appliance – it's a toaster with pictures” (Mayer 1983). Fowler saw regulation not only as a barrier to business, but as a threat to free speech and “true freedom”, with a potential for state control: “in the same way Nazi Minister of Propaganda Joseph Goebbels took over the reins in Germany and the military took over in Poland, some bad guy in the White House could be manipulating the media here” (idem). Reagan's FCC pushed for a conceptual change whereby, in Fowler's words, “the perception of broadcasters as community trustees should be replaced by a view of broadcasters as marketplace participants” (Rendall 2005). Politically, this deregulation paved the way for single-perspective, unchecked extremism in the media, of which Fox News and far-right radio talkshows are good examples (Curran 2011:23–24).

Before moving on to the next section, in which I analyse how these theoretical, rhetorical, and political traits of the neoliberal professionalisation project were adapted for the case of the “*apertura*” or liberalisation of the Mexican media, I would like to make some pertinent clarifications. First, as the reader might have realised by now, the terms profession and professionalism are contested categories in themselves, often used and interpreted by different groups as effective devices in power struggles – which is another way to say that professionalism is historically constructed. So far, I have studied the way in which a particular constellation of actors – what we have referred to, for lack of a better term, as the Talloires coalition – talked about professionalism, but I am aware that this is only one among many variations of the term. I am mostly interested in this specific historic construction of professionalism for the profound influence it had in shaping the narrative of Mexico's democratic transition, and because it remains today the cardinal orientation and knowledge horizon by which most of my participants make sense of the Mexican journalistic world. Moreover, the abovementioned features of the neoliberal project are present and in fact a constitutive part of the theories and academic literature that tried to explain the Mexican media transformation in comparative perspective, by mobilising concepts from political science – in particular, new institutionalism and organisations theory, as well as behavioural economics and psychology. In this sense my goal is twofold. Not only do I try to revise and reinterpret the history of Mexico's “*apertura*”, but I intend to reassess the utility and precision of

some of the key sociological concepts used in communications and media studies, notably: professionalisation, professional culture, civic entrepreneurship, competition, free flow of information, and the marketplace of ideas. Deeply ingrained in the 1990s professionalisation discourse in Mexico and other parts of the world, was a seed of depoliticisation and mistrust which made “collaboration”, “agenda”, and “public intervention” dirty words, comparable to “collusion” or “clientelism” in newsroom ideology. This discourse had the effect of making us – scholars and practitioners – blind to the actual everyday practices behind journalistic production. In particular, it rendered invisible and taboo all other dimensions which did not respond to the spirit of competition, exclusion, insulation and individual self-interest. I am talking about all kinds of cooperation networks, alliances, reciprocity, solidarity, and trust-building within and outside the professional boundaries of journalism, which have always existed and in fact are crucial factors for understanding the transformations of Mexican journalism. The next chapter will be dedicated to this enterprise.

3.4 MEXICO’S MEDIA “OPENING”

So far, we have analysed the global triumph of the “free flow of information” doctrine and the political use of professionalisation by the neoliberal programme in the second half of the 1980s. But how was this global trend adopted and translated in a media system like Mexico’s? How were the main elements of neoliberal professionalisation (depoliticisation; individual over structural, and private over public) adapted to Mexico’s reality? How did Mexican media and journalism pass from being regarded as a Latin American hub for a “new world order” in the 1970s to becoming an example of press liberalisation in the 1990s; from the NAM to the NAFTA? What were the main concepts and theories mobilised at the time by international and national academia, the media industry and the journalistic trade to explain the so-called “opening” of the Mexican press and the high hopes set on its ability for democratisation?

3.4.1 THE COMPETITIVE AND CIVIC TELOS

Let me begin answering these questions by examining Chappell Lawson’s *Building the Fourth Estate* (2002) and Sallie Hughes’ *Newsrooms in Conflict* (2006), as well as a handful of their co-authored articles, which strongly influenced later discussions precisely because they captured the 1990s enthusiasm for Mexican *apertura* so well.

In 1995-96, when Lawson was doing his PhD fieldwork and data collection in Mexico for *Building the Fourth Estate*, Mexico’s future seemed – from in and outside of the country – promising.

Indeed, it was seen as offering a textbook case of a broader narrative about the power of neoliberalism to eventually bring democracy and freedom to old authoritarian or post-Soviet societies; to build citizenship in “(un)civil” societies. It is no coincidence, for example, that in his book Lawson talked about changes in the Soviet media under Gorbachev’s *glasnost* being “reminiscent of changes in Mexico”. Or that he used the term “Salinastroika” to refer to a technocratic and neoliberal turn in the Mexican State – specifically, a combination of austerity, privatisation, and fiscal policy implemented by President Carlos Salinas de Gortari (1988-1994) that affected the State-media relationship (2002:76,205).

In the post-Cold War era, Mexico and its press attracted the attention of international academia, which, according to Lawson, was “due to the remarkable scope of change in the media over the past fifteen years” and to the fact that Mexican *apertura* was “one of the elements of Mexican social life that most gives politics in that country a modern, democratic hue” (2002:8). The Mexican press was portrayed as one more positive instance of the then largely accepted and endlessly discussed model of “transition to democracy”:

Mexico’s media would soon reach seven or eight on a ten-point scale of openness, but it would probably not get to ten. This caveat aside, the transformation of Mexico’s media is impressive, and it seems fitting to conclude by emphasizing the positive [...]. The difference between a two or three and a six or seven is the difference between Orwellian reporting and serious coverage with flashes of investigative brilliance; between a captive press that parrots official pronouncements and a reasonably vigorous Fourth Estate. (ibid.:177)

These optimistic claims and *bon-élève*-yet-struggling grades were backed up, according to Lawson, by various key indicators: the “estimated percent of reporters who received bribes”; estimates of – as Lawson admits – “wildly exaggerated” self-declared circulation and rating figures (ibid.:62); estimates of revenue from government advertising; and a numerical “independence” index of his own manufacture, based on content analysis of news production during one week in 1995 and another in 1996, which was used as a proxy for measuring the percentage of official sources, politically sensitive “off limits topics” or scandals, and editorial criticism of the PRI government in news coverage. By mobilising the apparent precision of statistical correlations, quantitative indexes, and graphs, Lawson used these at best limited estimates to put forth bold generalisations about the emergence of the independent press in Mexico, and to propose a “media opening” model of comparative aspirations, to be used in studies of countries like Brazil, Russia, China, or South Korea.

Under Lawson’s model, media opening was understood as “a process by which mass media become more representative of societal viewpoints and more independent of official control” (ibid.:3). In turn, representation and political independence were achieved by the market forces of competition, wherein the private sector and commercial advertisers played a central role. Its logic

works as follows. Either motivated by austerity, as a response to economic crisis, or by its technocratic belief in reducing protectionism and shrinking the State, “Salinastroika” meant a period of scarcity for the Mexican media system. According to Lawson, because of this presidential shift, the federal Executive branch drastically reduced the money allocated to the media in the form of bribes, official advertising, and other “subsidies” “on which they would have otherwise been forced to depend (and which would surely have corroded their sense of mission)” (ibid.:89). This created a survival situation and a need for an “alternate stream of revenues [which in turn] came from readers and private sector advertisers, who themselves responded to readership” (ibid.:89). This new economic lifeline and “financial autonomy” were possible thanks to a new source of money: the increasing economic liberalisation and commercial integration with the United States and Canada, which culminated in 1994 with NAFTA, and meant a multimillionaire private advertising investment from international and national companies willing to pay the Mexican media for adverts to place their products and services in the Mexican market.

Moreover, Lawson stressed the importance of Salinas’ market-oriented policy and privatisation strategy in terms of sponsoring market competition. In particular, he mentioned the end of the state monopoly on imports, production, and distribution of newsprint paper for the press (PIPSA) in 1990, and the privatisation of a public television network (the Mexican Institute of Television, Imevision, later sold to a media mogul and renamed TvAzteca) in 1992, which introduced a second commercial TV option in addition to Televisa. Offering a handful of businessmen access to imported (mainly Canadian) paper and broadcasting concessions meant that “by 2000, independent publications were competing not only against the remnants of the old regime but increasingly against each other” (ibid.:80). And this is the conceptual cornerstone of the *apertura* model: in Lawson’s words, “competition, competition and more competition” (ibid.:112).

The causal mechanism was extremely simple: survival of the fittest – in this case, the democratically fittest, the most independent and civic-minded. Similar to Susan McKinnon’s critique of “natural selection” in neoliberal evolutionary psychology, market competition is conceived of as a force of social change which is granted active intellectual agency, “as the grand ‘puppeteer’, the ‘ultimate policy maker’, the ‘Blind Programmer’” (2005:16). In Lawson’s model, market competition “acts”, “pressures”, “encourages”, “controls”, “selects”, “purges” and has a perspective of its own, which, if experienced without barriers and in its perfect form, has a virtuous effect on people.

Pushed by a survival instinct to face the alleged scarcity under “Salinastroika” and grapple for the biggest slice of the new NAFTA commercial advertising, “market forces encouraged the notion that [...] ‘telling the truth is a good business’. Entrepreneurial publishers soon saw the opportunities that independent reporting offered, and competition encouraged previously sleepy

or *oficialista* media to adopt more independent postures” (Lawson 2002:89). Consumer popularity, expressed in high ratings and circulation, was king: a true expression (so the model goes) of what audiences wanted to hear, watch, and read. According to Lawson, the vast majority of Mexican audiences preferred critical and independent news, so they switched to TvAzteca, to “feisty, irreverent, incendiary, and critical radio personalities”, and to a new species of politically independent print media (ibid.:112).

Moreover, for Lawson this relative popularity of independent publications caused two instances of natural selection. First, in times of economic crisis, independent media have more chances of surviving than traditional ones, so for instance the Mexican economic crisis in 1994-95 had a “purging effect on Mexico’s increasingly competitive newspaper market” (ibid.:79). Second, because of its higher survivability and financial gain, market competition ensured the reproduction and spread of these traits and behaviours to the rest of the media ecosystem: “in a sort of *cascade effect*, the initial success of independent publications encouraged the gradual transformation of the press as a whole”²⁷ and “stimulated more aggressive reporting”, which trickled down to pro-regime (*oficialista*) competitors to the point where “ultimately, independent journalism spread to virtually all major media markets. By the late 1990s, Mexico’s Fourth Estate was firmly established” (ibid.:89,91).

And so, the cycle is complete. Under this model, by pursuing profit, self-interest and competition, Mexican capitalists ended up increasing the societal representation and political independence of news, “under pain of losing market share”:

because private-sector advertising depends heavily on ratings, and because stations find that ratings rise with candid discussions of the news and controversial public issues, they have been increasingly willing to sacrifice public revenues in return for market-based rewards. (ibid.:112)

I think it is time to pause and clarify some of the key assumptions behind the *apertura* model, as well as its rhetorical strategies, conceptual limitations, and, most importantly, political consequences.

3.4.2 REPRESENTATION AS A MARKET

To recapitulate, one of the key claims of the *apertura* model is that the Mexican media became more “representative of societal viewpoints” because from a market-driven perspective, even the more traditional *oficialista* media had to adapt and compete for private adverts, or perish. Thus, if they wanted to gain popularity and higher ratings, and therefore be able to charge higher rates to commercial advertisers, the media supply necessarily had to correspond to demand: to the

²⁷ My italics.

preferences of Mexican audience-readerships eager for critical and independent content. Rhetorically, conceiving of representation as a *market* presents this process as a neutral, unbiased, and, most importantly, depoliticised way to simply mirror what consumers “out there” want. No political intermediaries are required; there is a sensation of economic “incentives” being aligned in a one-to-one correspondence between commercial sales (ratings, circulation, and advertising revenue) and how content covers what society as a whole believes. However, this metaphoric exuberance is problematic in various ways.

First, simply because a consumer (the target of private adverts) is not the same as a citizen, there is a risk of reproducing inequality by giving more representation to those who can consume more, or excluding those with less purchasing power. Here the illusion of the “consumer’s sovereignty” is mobilised again and, as discussed in the pages above, it is portrayed as a quasi-mechanism of accountability. According to Lawson, private advertisers functioned as new non-partisan intermediaries who by definition “responded to readership” and whose “businesses promptly became more sensitive to the audience levels and profiles of the media in which they advertised. Advertisers’ savvy sharpened competition and rewarded more independent media, whose share were growing relative to their traditional counterparts” (Lawson 2002:117). This is at best misleading because the logic of marketing (reach, cost per lead, traffic, client engagement, conversion rate, etc.) does not make up for the complex political relations between those represented and those representing. Yes, Mexico’s neoliberal turn in the 1990s increased the share of private sector advertising that was available to the media; however, there is very little reliable evidence from which to deduce the criteria used by top advertisers – the economic elite – to allocate these resources, and even less to back up the assumption that they “rewarded” media independence following “democratic” criteria. Just to give an example of these contradictions, according to *El Universal*’s internal market research – used by Hughes in 1999, months away from the democratic landmark of the first alternation of presidential power – *Excelsior* (the worst example of authoritarian journalism according to Hughes’ civic index) had both the third biggest income from private ads *and* the worst drop in readership ranking. Another example is *El Financiero*, which had an allegedly improving readership and yet very low income from private ads, at almost the same level as the “authoritarian” *El Sol* (Hughes 2006:68,118,119).

Moreover, we all know of cases where advertisers’ readings of societal preferences misrepresent the viewpoints of the majority of the population or even reproduce oppression and prejudice. To mention an example to which anyone living in Mexico can relate, if one looks at visual advertising from food and drinks brands to clothing or cars it would appear that Mexican society is almost entirely white, for dark-skinned people are usually non-existent in these commercials, except for portraying undesirable situations like poverty, or charity. As Carl W. Jones

has shown in a recent study, Mexico's wealthiest capitalists of European descent like the Servitje, Bailleres, and Garza families use "aspirational advertising" to reproduce "racial and social inequalities in Mexico, and reinforce colonial thinking in the country" (2019a), precisely because "through their control of capitalism and communication, the ruling class minority have made their lifestyle and skin colour aspirational for the darker-skinned, lower-class majority" (2019b:255).

As Stuart Hall signalled, semiotic and discursive representation "does not work like a mirror [...]. Meaning is produced by the practice, the 'work', of representation. It is constructed through signifying – i.e. meaning-producing – practices" (1997b:14). This "work" of representation is precisely what it is absent in the notion of media opening via market competition. As we have discussed above in the case of Reagan's FCC, this is so because under the doctrines of "free flow of information" and the "free marketplace of ideas", cultural production and news in particular are considered commodities devoid of any symbolic or political power, hence the strategy of envisaging the media as appliances, and their proprietors not as community trustees but as marketplace competitors. This, of course, is an oversimplification: cultural production, especially news, have symbolic power, and representation is political. Following Hanna Pitkin's seminal work on representation,

political questions are not likely to be as arbitrary as a choice between two foods; nor are they likely to be questions of knowledge to which an expert can supply the one correct answer. They are questions about action, about what should be done; consequently, they involve both facts and value commitments, both ends and means. And, characteristically, the factual judgments, the value commitments, the ends and the means, are inextricably intertwined in political life. Often commitments to political values are deep and significant, unlike the trivial preferences of taste. (1972:212)

In Lawson's model there is no mention of the concrete mechanisms through which "societal viewpoints" were articulated in everyday journalistic coverage. There is no mention of representation as an activity or dialogue: a way for journalists to meet, hear, and interact with real people from their audiences, or even to build something as delicate and complex as trust (mechanisms of this sort could include letters to the editors, the right to reply, source and community relationships, etc.). In fact, Lawson's criteria for "openness" have little to do with society's views, focusing instead on the media's position regarding politicians and political partisanship: criticism and scandals against the PRI, and the percentage of PRI government sources. The audience is absent.

If representation is conceived of as a market, apart from "choosing" another media brand like any other non-symbolic commodity or service, there was no possibility in practice for audiences to have a say in discourse formation, to contest and influence the production of meaning. That is to say, no consumer "sovereignty" is in place – not even a reciprocal or accountable relationship. And because a competitive market always mirrors what consumers want, there is no tension or in

fact even the possibility of power relations between audiences and news producers. Conflict is absent. Instead we are presented with a virtuous alignment of commercial interests and a synecdoche where ratings are a proxy for the views of Mexican society, a notion which Pitkin characterises as an

automatic harmony [where] a sort of political “invisible hand” is supposed to prevent any real conflict. The nation is made up of its parts, so the national interest must be the sum of local or partial interests. The trouble with this argument is that it is false. [...] Politics entails the reconciliation of conflicting claims, each usually with some justice on its side; the harmony of interests must be *created* [...] continually re-created by the representative’s activities. (1972:217–18)

3.4.3 FROM ESTIMATIONS TO CERTAINTIES

A second problem is of an empirical nature. There is an assumption that societal viewpoints can be deduced from estimates of sales numbers, which in turn are presented as proof that market competition forced independence on a reluctant media because it was profitable, because consumers rewarded that trait (Hughes 2006:119). The problem with this claim is that it relies on highly speculative data: a snapshot of self-declared circulation and ratings in 1995-96 in Lawson’s case, and Hughes’ variations of top seven ranking newspapers from 1991-2000, based on methodologically incompatible marketing reports from different private consultants, some of them hired by *El Universal* (Hughes 2006:118–19 footnote 15, 17; Lawson 2002:233 footnote 4-5). Thus, these data are impossible to falsify without gaining access to classified records, for the mere reason that commercial media are private companies and in Mexico there is no law, media council, or regulator which can legally bind them to transparently report these figures. This is important to take into account, because a big part of Lawson’s and Hughes’ narrative – independence by market Darwinism – relies precisely on these estimations, drawn from interviews or private market research reports. Let me explain this very quickly. If adverts depend on the number and type of ears and eyeballs a given media can attract, there is an interest in inflating one’s own self-declared circulation ratings figures, while deflating the competitor’s. This implies a potential conflict of interest.

Circulation and ratings of private media are among the best kept “trade secrets” and something that researchers know very little about (especially in the *apertura* years of the 1980s and 90s). As Raul Trejo Delabre pointed out:

the estimates of prints (*tirajes*) [...] are inevitably approximate, a policy of secrets and simulations has prevailed on the part of the entire Mexican press in this respect. [...] Newspaper print numbers do not, necessarily, represent the quantity of readers. (1990:65)

Furthermore, there is contrasting evidence to indicate that Mexican audience-readerships were more diverse, complex, and most importantly interested in other types of content than those that the *apertura* model praises as the civic vanguard of media opening. For instance, Pablo Piccato’s

fascinating work on crime news and daily tabloids and magazines – known as the “*nota roja*”, such as *La Prensa*, *Alarma!* and *Detectives* – has shown that, despite all its shortcomings, this genre covering urban violence and gory multiple homicides achieved emotional force, reader participation, and great popularity (probably only matched by sports tabloids). According to Piccato, in 1966 *La Prensa* sold between 35,000 and 70,000 copies a day and in weeks marked by particularly gruesome cases *Alarma!* was said to sell half a million copies (Piccato 2017:203–4). I do not pretend to be able to verify objectively which estimates can be considered valid. My point is that these levels of circulation are something which Lawson and Hughes only estimate to be attainable 30 years later: only after the neoliberal turn and NAFTA, only after the awakening of the Mexican “civil society” and its “shift in favour of civic publications” (Hughes 2006:116–19). Most importantly, they believe them only to be attainable by the few media – *Reforma*, *La Jornada*, *El Financiero*, and *El Universal* – that, according to their indexes, possessed or adapted to the vanguardist traits of independence and representativity, for the rest of the Mexican newspapers “tended to have very limited readership – in most cases, below 10,000 copies per day” (Lawson 2002:63). In fact, popular crime and sports tabloids are not even mentioned in Lawson’s work, and they are acknowledged, but then normatively omitted, in Hughes’ analysis.

These are the same papers that, as a boy, I remember were in the front seat of my uncles’ old white pick-up truck, which they and my mum used to get food supplies from La Merced and La Viga markets for the family’s *tortería* in the city outskirts of Estado de México, where I grew up in the 1980s-90s. I think of the newspapers in my uncles’ truck because, as a Mexican researcher from a working-class family of *comerciantes morenos*, I cannot conceive of and accept a “democratic opening” model under which it was assumed so naturally that no real “citizens” read this kind of press and that nothing “civic” could be found in the everyday practices and appropriation of news of people like my uncles and aunties (who for all practical purposes of the model are left out of the political history of Mexico); conversely, for the *apertura* theorists it seemed *obvious* that real “citizens” read *Reforma* (Hughes 2006:118 table 6.2), and the rest “was Cuautitlán”. Moreover, following Piccato (2017), after almost 15 years of generalised and relentless violence in the country, we now know that anti-press attacks are mainly suffered by “*nota roja*” journalists, precisely because all those “uncivic” publications normatively omitted from the *apertura* model were not merely a burden of the ancien régime, but played a crucial role in Mexico’s political life as a symbolic arena (Adler-Lomnitz, Salazar Elena, and Adler 2004) where the dense webs of politics, economic interest, and violence structuring the new local order occurred, and without which they would be very difficult to understand (Arteaga-Rojas 2019).

This is not to make a case for “high” versus “low” forms of content, nor a culturalist attempt to romanticise or demonise either elite or popular audiences in Mexico. The point I am

making is twofold. On the one hand, I argue that it is not clear that there was a one-to-one correspondence between demand and supply (the motor of the market's natural selection); between commercial popularity and independence or hard news coverage. In a different context, Nicholas Lemann, former dean of the Graduate School of Journalism at Columbia University, recently made a similar point while remembering his years as a reporter at the *Washington Post* in the 1980s:

we would have said that subscribers read the paper because of the news coverage [...]. The idea that many readers valued the newspaper merely as a miscellaneous package of information (high school sports scores, stock tables, movie times, weather predictions), or even that some people read the paper mainly for the ads would have seemed absurd [...]. What nobody imagined was that a really good search engine could attract an audience many orders of magnitude larger than any news site, without producing any original material at all. (2020:40)

What if the *apertura*'s much-praised critical, independent, and original coverage was unprofitable or not that popular after all? What if people read the paper or tuned into a station for myriad reasons beyond coverage on elite politics? Under the "free marketplace of ideas" doctrine this is unthinkable, because profitability is normatively considered the main source of autonomy and independence, and the reason why "from a commercial perspective" "feisty, irreverent, incendiary and critical" anchors and journalists were profit-making "gems", and hence "hard to fire when they displeased government officials, as owners could not easily dismiss independent-minded announcers who maintained high ratings" (Lawson 2002:112). However, cultural production can be, and often is, "bad business" for making money, yet profitability is not the only reason why certain types of cultural production might be socially or politically *valued*. The only impediment is that such a valuation requires articulating a notion of public interest and symbolic power, which, as we have shown, this doctrine lacks and prevents. To be fair, we still know very little about audience-readership behaviour in Mexico, but even if we could get access to private classified records, these numbers cannot speak for what John B. Thompson (1990) calls the "everyday reception/appropriation" of media production. Yes, further research is certainly required, but this should call for thick description and cautious analysis, not for normative assumptions where audience-readerships have self-evident preferences, or are portrayed as passive recipients of coverage using fragmentary facts or answers to survey questionnaires. The problem with the *apertura* model is that the necessary audience research never took place, and its main inferences and conclusions about media change were largely or exclusively "read off" the content of media production and estimated sales, without asking or observing readers, listeners, or viewers in real life. Thus, its analysis falls into what Thompson calls the "fallacy of internalism", because

it cannot be assumed that the characteristics which the analyst discerns in a particular cultural product will have a given effect when that product is received and appropriated by individuals in the course of their everyday lives [...]. To attempt to read off the consequences of cultural products from the products themselves is to neglect these ongoing activities of interpretation and assimilation; it is to

speculate about the impact of these products on the attitudes and behaviour of individuals without examining this impact in a systematic way. (1990:105)

On the other hand, I argue something that should be obvious, but which is important to make clear when trying to denaturalise neoliberal assumptions: market competition produces all sort of effects on media production, not exclusively or inexorably “democratic” ones. Even Olympian athletes can bend the rules or cheat to compete. You can steal from or sabotage competitors; you can systematically phone-hack murder victims and vulnerable sources for headline-hungry competition; or exploit, underpay, and fire your workers to cut corners – which has traditionally been the “competitive advantage” of Latin Americans according to neoliberals. In other latitudes, there is growing evidence – especially in the context of decreasing commercial revenue and increasing market competition in the digital age – of what “competitive” and “efficient” media strategies have meant for journalists: increased workloads, “flexible” casualisation, and multi-skilling for low pay (NUJ 2007); cost-cutting in substantive editorial areas, notably investigative and specialised reporting and foreign correspondents (Freedman 2010); “job cuts and declining employment security, the hiring of cheaper, junior staff replacements” (Davis 2010:60); increasing immediacy, overwhelming deadlines, and “faster and shallower” reporting (Lee-Wright, Phillips, and Witschge 2012); less original news production, and repackaging of second-hand material, cables, and press releases (McChesney and Nichols 2011). Moreover, after the Leveson inquiry, we know that in media systems like the United Kingdom’s competing for market share and sensational exclusivity also has a dark side and can lead to sinister invasions of privacy (Fenton 2016; Leveson 2012). In the Mexican context, Ella McPherson (2012) has shown how, depending on newsroom hierarchies and the social organisation of journalistic work, increasing market competition can simultaneously produce strategies of differentiation *and* the opposite reaction: spot news simulation and homogeneity through cross-media conglomerate cannibalisation.

Furthermore, it is not clear that the alleged scarcity of public resources truly existed under Salinas’ and Zedillo’s presidencies (1988-2000), nor that this scarcity worked as a form of competitive Darwinism in which co-opted media were “purged”, and market-driven media thrived. Lawson backs up these claims with the correlation between his “independence index” and the “estimated percent of revenues from official advertising” for the year 1995, whose source is a report by a private consultant, Consultores Internacionales, paid by two major Mexican radio conglomerates, Radio Centro and Radio Red (2002:90,213,263). Making any inference from these data should at best call for very cautious and limited claims. First, gaining public records of not only the programmed but also the *actual* federal budget spending would require a rigorous investigation of its own, almost certainly involving Freedom of Information Act (FOIA) requests, which were just being implemented by the time Lawson published his study. Even then, as most

of the journalists I talked to surely know, there would be numerous hurdles to overcome to get hold of such records.

Moreover, as Rafael Segovia has pointed out, there is a reductionist, yet still unwavering belief among transition theorists and political scientists in the hyper presidentialism of the PRI's "perfect dictatorship", where "the President *is* the political structure": an authoritarian pyramid with a strong yet in some cases benevolent President sitting on top (1975:48–49). By focusing almost exclusively on the executive branch and the "Salinastroika" presidential mandates, the *apertura* model neglects the complex power relations established through time between the media and other political and governmental actors. These include an increasingly autonomous Congress and the Judiciary, decentralised subnational governments, and a handful of political parties which with every electoral reform (especially those of 1994 and 1996) grew in political influence and gained public funding for buying spots and adverts for their candidates in the media. Political actors who thanks to the regime's crisis of legitimation increasingly had more power, access to public offices, and budgets, as well as the ability to grant broadcasting concessions.

Moreover, the influence of this temporarily convergent (but not identical) constellation of political actors, often called "the opposition", relied on mobilising the myth of a "perfect dictatorship" in public opinion through polarising and antipolitical scandals – what Fernando Escalante and Julián Canseco (2019) call "antagonistic culture" and Vanessa Freije (2020) refers to as "*denuncia* journalism". These forms of anti-PRIism, "oppositional" politics and internal elite struggles are precisely the main components for Lawson and Hughes' "independence" and "civic" indexes. Thus, under the *apertura* model the complexity of societal representation and journalistic autonomy is reduced to the proxy of oppositional politics, and at the same time this is treated as a sign of a desirable depoliticisation of the press. This leaves little room for exploring the mainstream Mexican media's political pragmatism and their strategic approach of not putting all their eggs in one basket, but rather cultivating a relationship simultaneously with today's and tomorrow's parties in power.

On the contrary, this crucial shift of political power is dismissed in Lawson's account as a "modicum of political space [that] was needed for an independent press to emerge, [but] changes in Mexico's political context were not the primary cause of media opening" (Lawson 2002:82). Yet, there are reasons to reexamine "Salinastroika" and the end of 1990s as an example of laissez-faire relations between press and politics. A brief example: aside from their regular operational funding, political parties had the equivalent of 3,500 million pesos in today's currency for the non-presidential elections of 1997 and 4,500 million in 2003 as public funding for campaigns (Ramírez Lemus and Zepeda Gil 2017:22). Moreover, before tighter regulation was introduced in the

electoral reform of 2007,²⁸ media access for candidates was bought at the discretion of media owners who negotiated these extortionate rates, which challenges Lawson's idea of power and control radiating in a single direction from the State towards the media or the notion of media being "forced to depend" on "subsidies". This is something different: an instance of politics being subordinated to the media. Even during the last years of one-party rule and in conditions of continuous economic crisis, highly ritualised elections took place and so campaigns were, and continue to be, a very lucrative, predictable, and seasonal source of revenue, political, and symbolic influence for the media (Adler-Lomnitz et al. 2004).

In sum, the *apertura* model rhetorically articulates an implicit evolutionism – a teleological and always positive change – in the way that estimates, reified as numerical indicators, are interpreted and then used as conclusive evidence of the causes and effects of market competition in the media opening. There are reasons to question the metaphors of survivalism and market innovation through natural selection, the claims about the scarcity of public money and the presidential pyramidal mandate, as well as the automatic harmony between profit, independence, and representation. This is where a closer look at what those numbers can and cannot tell us is vital for future research.

3.4.4 PROFESSIONAL MUTATION AND IMPORTED ENLIGHTENMENT

All these functionalist contradictions made the *apertura's* competitive telos particularly weak in its capacity to explain how the Mexican media system responded to economic and political shifts to foster democratisation and opening, which the model had promised and deduced from neoliberal doctrines. If popularity as profit and market competition accounted for the increasing autonomy and power of the "feisty, irreverent, incendiary, and critical" type of journalist inside the newsroom (they were supposed to be "harder to fire"),²⁹ this does not explain how this type of journalist came to have different norms and values from the others in the first place. However, even if this process of survival and dissemination – which I characterised as the market's natural selection – could be contested, the model relied on another key normative element which is often taken for granted: the *emergence* of a new set of "civic" values and professional norms among a younger generation of journalists. What were the distinctive traits of this new "species" of

²⁸ A reform that was fought against very aggressively by media owners and intellectuals – columnists from both Televisa and TvAzteca, as well as the mainstream radio and newspapers – and, as I have written elsewhere, was one of the main causes of a belligerent antipolitical media campaign calling voters to nullify ballots so citizens could "get rid of the whole political class" in the mid-term elections of 2009 (Arteaga-Rojas 2012:102–7).

²⁹ The well-known experience of the *Aristegui Noticias* team that was sacked in 2014 from MVS radio serves as an illustrative counterexample of the limitations of high ratings and business profitability as a civic drive for media moguls, even after the fall in 2000 of the PRI regime.

journalist? Where did their new norms and values come from? How were these traits maintained and reproduced over time and across the Mexican media, to make this the most important factor for the *apertura* model?

The idea was extremely simple. For the market to produce democratic outcomes, the game of competition – in the absence of state regulation – was only as good as the virtues of its players. Whether the best player always wins or bad players yield bad outcomes, the game stays the same. So, to reconcile the market with democracy, the model required the construction of imaginary citizens, whose new beliefs and behaviours were almost entirely responsible for the media opening and a broader “awakening of civil society”. At its origin, then, the Mexican media transformation was conceived of as a mutation at the individual-personal level, which preceded the neoliberal turn. It was an explanation based “on vision, commitment, identity-defining personal experiences [and] a new journalistic culture” (Lawson 2002:83). It was a case of the spontaneous “emergence” of a cohort of “abnormally committed individuals” waiting for the right (neoliberal) environmental conditions to arrive (ibid.:88). Everything could be traced back to a handful of “change agents”, pioneers, or “entrepreneurs” who at some point in the mid-1970-80s developed “oppositional values”, “changing self-perceptions”, and “alternative ideas about journalism” (Hughes 2006:108,113) as a natural reaction to the PRI’s authoritarian environment. According to Hughes and Lawson, what distinguished these leaders or entrepreneurs was their age (they were young) and their uncommon altruistic motivations, moral superiority, and extraordinary convictions.

Their motivations were considered atypical and their actions a “deviant conduct” (Hughes 2006:112) because the rest of the Mexican journalists were assumed to be traditionally “corrupt, dull, inaccurate, and politically partisan” (Lawson 2002:119), following “a passive, noncritical approach to reporting [and viewing] themselves as part of the regime rather than civil society. Their worldview was one in which to support the state was considered normatively appropriate, and, eventually orthodox” (Hughes 2006:50–51). Under this diagnosis of generalised immorality and vice, the researchers accepted without much discussion that whosoever gave coverage to the opposition and criticised the PRI regime constituted a virtuous and homogeneous category of people with common factors of personality, morality, and life experiences:

nontraditional journalism, therefore, had to be honest, factual, balanced, and interesting. As a consequence, qualities like accuracy, fairness, integrity, and even creativity in format tended to go together in the minds of independent journalists. (Lawson 2002:119)

It is no coincidence that, for the *apertura* model, one of the clearest signs distinguishing independent-civic journalists was phrased in moral terms: their “armour-like plating” against corruption in all kinds of exchanges with the state – from payoffs, bribes, and gifts, to information and interested scoops (Hughes 2006:42, 122–23). Of course, empirically, these moral distinctions

were very hard to prove for the simple reason that there is rarely any record of those transactions and by definition they are not made out in the open. Nevertheless, again, Lawson mobilised a ranking of his own manufacture of the “estimated percentage of reporters who regularly receive bribes” among Mexico City’s dailies, by asking 15 journalists about their perceptions. Needless to say, these data should be treated with scepticism, since corruption has been a very effective political tool for discrediting competitors, which introduce serious biases into the answers about one’s own media or others’. Again, these estimates were reified into numerical certainties as Lawson claimed that there was an exact “-0.76 correlation” between independent coverage and Mexican journalists’ estimated propensity to bribes (Lawson 2002:86,213). Beyond the reliability of these data, what is more revealing is that this culture of mistrust and generalised suspicion – or certitude of corruption – ends up being attributed almost exclusively to the figure of the reporter, the rank-and-file media worker at the bottom of the hierarchy, whose control and monitoring, as we will discuss later on, would be the subject par excellence of the professionalisation project.

The new professional orientation also meant altruism and the lack of an instrumental rationale. Unlike market-driven media players who “looked at Wall Street rather than Watergate for inspiration” (Hughes 2006:42), Mexican civic entrepreneurs and their media were not there for the money. They were “guided more by ideas and values than financial fortitude or the search for profits” (ibid.:238) and “adherence to a particular journalistic vision was more influential in the decision to found independent publications than the desire for financial gain” (Lawson 2002:83). In particular, these individual virtues and altruism were epitomised by the key figure of the businessman: media barons, owners, publishers. In most cases, the key element in divergent pathways between authoritarian and civic media was phrased in terms of the personal attributes of their owners and a pyramidal hierarchy, for “newsrooms cultures can buffer changes of many sorts, but cannot forestall them if owners are intent on transforming a publication” (Hughes 2006:236). Thus, authoritarian continuities and slower “opening” processes were mainly attributed to the “lack of entrepreneurial talent and imagination”, a “lack of daring” or a combination of media owners’ “personal biases with their commercial myopia” (Lawson 2002:119,179).

Inversely, the “entrepreneurial vision, a civic-style of competition, personal confrontations with a disintegrating political system” and prestige of “a group of business owners professing free market and prodemocratic ideals” accounted for a big part of the Mexican journalistic “civic” awakening (Hughes 2006:146). In Lawson’s words, “had broadcasters like Emilio Azcárraga been braver or had editors and publishers like Julio Scherer and Alejandro Junco been less brave, the evolution of Mexico’s media would have been much different” (2002:179). In what looks more like a biographical lottery rather than a sociological account of human agency, under the *apertura* model,

“civic” forces sometimes find a kind master, but at others fall into the hands of a vicious owner, and there was very little to do about it – no other form of social control or public regulation.

Reproducing the late 1990s enthusiasm for NAFTA (present in the elites of both sides of the US-Mexican border), the civic awakening of Mexican media owners came from abroad and was attributed to their “foreign journalism education” (Hughes 2006:124), in particular their chance to be exposed to free-market values and “U.S. journalism models” (*ibid.*:114). Like other forms of NAFTA-imported goodness (Gálvez 2018), commercial integration and “trade opening also increased the influence and proximity of foreign media styles, especially those from the United States, Spain, and Canada” (*ibid.*:124). In line with the post-MacBride redefinition of international aid into a “Marshall Plan for media and communications” (Mansell and Nordenstreng 2007:29), “the U.S. and Canadian governments, as well as private foundations, sponsored exchanges between Mexican, Canadian, and U.S. newsrooms” and encouraged Mexican journalistic elites to pursue “professional certificates in journalism” abroad and “forge their professional orientations” by working alongside (*watch and learn!*), aspiring to be, and being inspired by foreign journalists from the Global North (Hughes 2006:124). Again, this is neither a parochial defence of national pride nor an attempt to reify *a contrario sensu* something like a “Mexican journalism model”, but an attempt to point out the acritical way in which commercialism and Western professionalisation were portrayed by neoliberal theory as nothing but positive and desirable – as a unique, top-down chance for the Third World to gain imported enlightenment. Furthermore, I argue that reconstructing the ways neoliberal professionalisation discourse moved into a context like Mexico requires us to critically question who has the labelling power to establish what count as “the highest standards of professionalism” or “unprofessional deviance”, particularly regarding the global dynamics of power and knowledge we discussed earlier in this chapter.³⁰

Moreover, as we will analyse in further detail below, the fragility of this civic capitalism and corporate self-restraint would prove empirically to be an insurmountable contradiction for the neoliberal professionalisation project. In fact, even today this type of Big Man theory – which entails awaiting and relying on altruistic billionaires (that mythical beast) and wealthy patrons, from Jeff Bezos to Carlos Slim – continues to be deeply ingrained in the discussion around the future of journalism. As Nicholas Lemann has pointed out in the case of the United States:

³⁰ For instance, in 1992 the Inter American Press Association (IAPA-SIP) – the media owners’ group that gathered together the top Latin American moguls, from which George Bush Sr. launched the U.S. offensive against the NIIO – named Alejandro Junco, owner of *El Norte* and later of *Reforma*, as the association’s president and presented his newspaper with two awards, thereby constructing his prestige in the United States.

it's a sign of how strongly habituated American journalists are to thinking about their institutions only in terms of good and bad owners and not of policy choices [for example] the industry's recent deregulation as a major cause of everything [they] found alarming. (2020:41)

But let's for a moment put policy and structures aside. What explained the allegedly “civic” shift (*ciudadanización*) in media owners' values and leadership? Where did these new journalistic norms originally come from? The *apertura* model gives again an individual response: these acquired or inherited characteristics came from personal moments of sudden and great revelation or realisation, experienced through life-changing situations and “coverage of jarring events” (Hughes 2006:112). Change is assumed to be a spontaneous and natural “reaction to the failings and vices of traditional Mexican journalism” and the psychological “cognitive dissonance” experienced “in the wake of the Tlatelolco massacre of 1968, the national bankruptcy of 1985, the contested presidential elections of 1988, the Salinas reforms of 1990-92, and the tumultuous events of 1994” (Lawson 2002:87,179). Hughes also includes in the equation journalists' “front-row” exposure to systemic shocks like “the government's slow response to the Mexico City earthquake in 1985, electoral fraud beginning in 1986, the indigenous uprising in January 1994, the assassination of Luis Donaldo Colosio two months later, the 1995 recession, and the \$65 billion bank bailout in 1999” (2006:121). The model does not explain why and how this enumeration of historical landmarks – '68, '82, '85, '88, '92, '94, '95 and '99 – which were experienced by every journalist (in fact by every person) living in Mexico at the time, only had a positive “civic” effect on a few – those *moral* few – entrepreneurs. Moreover, as Vanessa Freije has recently pointed out, this epic idea of democratic transition as the sum of “watershed moments” was not so much a sociological transformation, but “was itself a creation of the press” (similar to the myth of Watergate in the United States, which we will explore in further detail in chapter 4) – a manifestation of its political ability to reckon with injustice, to construct and shape a particular event into scandals and agitation (Freije 2020 Kindle ed. Conclusions, loc.4918).

Furthermore, the problem with the media's civic awakening via watersheds is that traits of virtue and vice came from within individual psychology and left little room for a situational description of how those macro events in the history of Mexico affected the actual everyday practices, structural constraints, social interactions, and materiality of reporting and news production at a micro level. Just such an alternative sociological explanation of how journalists can devise new modes of practice and conventions through everyday reporting is what I try to elaborate in the empirical chapters of this study.

On the contrary, epic and iconic “transformative” events like the Zapatista uprising or Colosio's assassination are highlighted in terms of personal and “emotional affectation”, “enchantment” and journalists' “moral debt” to society (Hughes 2006:9) – although the same effects are not, apparently, attributed to less impressive beats or lower-key, but also potentially

instructive coverage or stories. This civic telos is the cornerstone and greatest weakness of the *apertura* model. For both Lawson and Hughes, “the social-psychological component of the model is the more powerful level of institutional action once a threshold of economic and political opening is established” (ibid.:239). Hence, even more important than market competition was “the emergence of new journalistic norms and visions”, for “no other factor or combination of factors can explain why independent publications emerged where they did and when they did in Mexico” (Lawson 2002:179).

Moreover (in an analysis that once again mirrors evolutionary tropes), once this professional mutation randomly appeared or “emerged” in a handful of moral entrepreneurs, profitability and market competition did the rest and acted as a mechanism of reproduction and dissemination. Thus, through an “elaborate process of cross-fertilization”, “contagion”, and mimesis, civic values spread and expanded *genealogically* (supposedly the lineage could be traced back to mythical figures of the Mexican Revolutions like the Flores Magón brothers), from a vanguard to an entire younger generation of journalists and a “progeny” of media outlets. This occurred to such an extent that they solidified into the new dominant professional *identity*, so that “by the mid-1990s, Mexican journalists had radically different views of their role in society and their relationship to the regime” (ibid.:83,179) and by the 2000s “civic newspapers dominated the market in most of Mexico’s major cities” (Hughes 2006:128).

3.4.5 THE RESILIENCE OF PROFESSIONALS AND THE FRAGILITY OF CAPITALIST SELF-RESTRAINT

So far, we have analysed the rhetorical and conceptual apparatus of the *apertura* model. However, as we saw in the global debate around the UNESCO’s new information order, the most important consequences of the triumph of the neoliberal professionalisation paradigm were political. In this respect, Mexico’s case was no exception. I hope at this point it is clear enough to the reader that the civic and competitive telos of the Mexican *apertura* shares the individualistic, private-oriented, and depoliticised traits of the discourse mobilised two decades earlier by a coalition of international associations of media owners from the United States, Latin America and West Europe. This crystallised in the Talloires declaration which, we can recall, “believe[d] that the ultimate definition of a free press lies not in the actions of governments or international bodies, but rather in the professionalism, vigor and courage of individual journalists” (AP 1981).

In a similar manner, under the *apertura* model, “the fate of independent journalism depended on the decisions of a cluster of people who were sufficiently committed to their professional vision as to resist official blandishments or reprisals” (Lawson 2002:83). It is not that Hughes and Lawson did not acknowledge the potential distortions and “barriers” to a free flow

and free marketplace of ideas. In fact, since the beginning, Mexican (and also Latin American) liberalisation was considered a distorted and incomplete affair compared to what the theory required – conditions that seemed unthinkable in developed (and also imaginary) countries. There was family-owned “crony capitalism” instead of modern corporations; “latter-day oligarchs” instead of shareholders; extreme ownership concentration and cartelisation instead of optimal competition; owners who “held political preferences [which] determined coverage” instead of philanthropists (Hughes and Lawson 2004:100); there was still an “artificially restricted supply of advertising [for] state-owned firms (such as Pemex)” instead of unconstrained private advertising (Lawson 2002:175). In the end, for neoliberals democracy is somehow always about privatising Pemex.

The real problem is that the two main mechanisms for counterweighing the power of private media capitalists were very fragile, for they were based fundamentally on the force of individual morality and the illusion of natural selection via market competition. Speaking of the future survival of Mexican civic journalism, Hughes stressed this fragile conditionality: “civic leaders and role models are in place now in the major newspapers, so civic journalism has a foothold at least for the next decade *if media owners cooperate*”³¹ (2006:206). What if they did not cooperate? That is why the *apertura* model required professionalism and professional norms to be reified into something as innate, life-changing, and genealogical as DNA mutations: a moral voluntarism ingrained in the depths of individual journalists’ identities. Because “although commercial competition and professional norms may restrain capricious intervention by owners in editorial decisions, it cannot remove the danger that media owners will manipulate coverage to serve personal ends” (Lawson 2002:176). Even in the heyday of enthusiasm, there was a veiled, top-down fatalism in its diagnosis: just as boys will be boys, owners will be owners.

Before going any further, I want to make it crystal clear that I am not arguing for a cynical view of journalistic work, or trying to demerit the vigour, courage, and vocation of Mexican journalists. In fact, during my fieldwork, I saw and heard firsthand accounts of great personal sacrifice, feats of endurance and extraordinary adaptability from rank-and-file reporters, in response to the increasingly exploitative, precarious, and violent conditions occurring even in the most privileged media outlets: underpaid reporters who could not afford to go to hospital because their media did not pay for their insurance or register them for social security; a reporter who fractured her arm while on the beat and was asked by her bosses to meet her deadlines regardless; a regional correspondent who was ambushed by lawyers and forced to sign her resignation without

³¹ My italics.

any compensation after decades of service; a middle-aged reporter who for years kept postponing her pregnancy because the top media conglomerate where she worked decided to invest in very fancy headquarters instead of crèches or decent maternity leave; the top investigative reporter whose media was very reluctant to give him resources for his personal and digital security; the daily reporters who worked overtime and spent their family time, weekends, and scarce holidays following leads without extra pay or more than scant institutional support or recognition from their bosses... In the empirical chapters I talk more about this “loneliness” of reporters and their strategies to find the energy to keep going, which rely upon support networks, and a certain collegiality and shelter found in what I call “sharing the excitement”.

However, my point is that, similarly to what happened in the global debate around the NIIO, we have to reexamine the manner in which this obsession with individual merits, morality, and the resilience of journalists has been used politically to divide the *gremio* and prevent any serious debate about structural inequalities, imbalances, and the precarity of media systems. It happens, too, with other professions whose tasks fulfil public services: professional teachers should not go on strike but rather “put the students first”; professional health workers should “heroically” endure austerity and higher risks at work. This technique resonates with Sara Ahmed’s (2017) reflections on how much the oppressed can bend and endure before they snap. Ahmed refers mainly to the feminist experience, but I find her discussion very insightful for analysing the ways in which neoliberal professionalisation has assimilated journalistic resilience as a way of preserving domination and media inequalities:

we can see how resilience is a technology of will, or even functions as a command: be willing to bear more; be stronger so you can bear. We can understand too how resilience becomes a deeply conservative technique, one especially well-suited to governance: you encourage bodies to strengthen so they will not succumb to pressure; so they can keep taking it; so they can take more of it. Resilience is the requirement to take more pressure; such that the pressure can be gradually increased. (2017:189)

And indeed, since the days of the MacBride report, the pressure on media workers has steadily increased. In contrast with the institutional fragility of “capricious” private ownership and market deregulation, the neoliberal professionalisation project bet on the moral resilience of reporters and media workers enduring public austerity and private precarity in the name of independence and civic duty.

3.4.6 DISENCHANTMENT AND DECLINE

As an epilogue to the Mexican context, let me go back to the teleological enthusiasm behind Mexico’s “impressive grades” in the media “opening”. If we remember, Lawson charted the country’s transformation from a two or three to a seven on his 10-point scale of “openness”. In theory, there was a bright future ahead after Vicente Fox’s victory in 2000:

some of these obstacles to media opening will fade over time. New firms will emerge; the conversion of family-owned businesses into modern, publicly held corporations will limit politically motivated manipulation of advertising and news coverage; continued economic reform will erode statist barriers; and regulatory capacity may improve. (2002:177)

The only problem with this is that at the turn of a decade none of these things had taken place in real life. Elections and opposition governments did not end old “traditional” State-press relations: as was to be expected without any egalitarian or redistributive policy in place, media concentration, inequality and reporters’ precarity increased; and anti-press violence reached the highest point in decades. Between 2002-06, the corporate media gained the power to lobby Congress to increase deregulation over concessions and fiscal airtimes and, in fact, as the #YoSoy132 protest highlighted, this played a key role in building up a favourable image of Enrique Peña Nieto, the PRI candidate who won the presidential elections in 2012.

As I mentioned in section 3.2.4, the relationship between the neoliberal doctrines of the free marketplace of ideas and free flow of information, and the sustaining of inequalities and exploitations of news production in Latin America and Mexico can be observed in a long process which has taken place over the last 50 years. A detailed historical account of this extremely complex web of public policy, institutional reengineering, implementation of indicators and incentives, as well as legislative reforms, international aid programmes, awards, and public relations far exceeds the scope of this study. For now, we can make some sense of the consequences of neoliberal ideology in the journalistic world by examining a few key factors. Over the next two decades, the reforms implemented by President Salinas in the 1990s, far from being the promised “Salinastroika”, in fact perpetuated structural inequalities, including the concentration of media ownership. According to the Media Ownership Monitor project (MOM) carried out by Global Media Registry, Reporters Without Borders and Centro Nacional de Comunicación Social (Cencos) – one of the few studies on media ownership concentration in Latin America with reports from Argentina, Brazil, Colombia, and Peru – Mexico’s media system stands out for its “lack of market data and transparency in audience measurement, the corrupting effect of government advertising and the insufficient regulatory framework [which are] key factors that increase the high level of media concentration in the hands of very few owners, instead of limiting it” (2017). Despite the opacity of private corporations, the scarce data available show that by 2010 “Mexico had one of the most concentrated audio-visual and telecommunication markets in the world” where two private television broadcasting companies (Grupo Televisa and TV Azteca) controlled 96.5% of audience shares, six radio groups owned 60.5% of radio stations,³² and one publisher (Organización

³² Grupo ACIR, Grupo Radiorama (PRISA Group, Spain), Azcárraga Family (Televisa Radio Group & Grupo Fórmula), Grupo CMR1, Grupo Ramsa and Grupo Radio Centro (GRC).

Editorial Mexicana) owned 59.4% of the market share of daily newspapers (Huerta Wong & Gómez Garcías 2016: 31).

Moreover, Latin America has experienced sustained pro-market deregulation of its media systems, partly promoted by national elites, and partly imposed by a neocolonial logic. As I showed in sections 3.2 and 3.3, Western neoliberal governments, think tanks, and media industries have a long and effective tradition of: a) threatening “developing” countries to quit any egalitarian reforms and adopt a pro-market ideology as a condition for accessing bilateral aid and international cooperation; and b) effectively “invoking the language of free speech” and the rhetoric of state censorship as “the default position of the press lobby” to boycott any attempt of public statutory regulation, which in practice means that “freedom of the press” has been used to ensure the “freedom of the powerful over the powerless” (Fenton 2018: 332). This can be seen in the Mexican context through the lack of an independent public regulatory body with the necessary statutory attributions and resources to not only provide the public with the basic data on private media corporations, but also to deal with press abuses of power and provide justice to the victims of press harm. Yet, the same media industry seemed not at all concerned about “freedom of the press” and the power of State intervention when its members were the beneficiaries of the government’s discretionary allocation of US\$2,073 million in federal public advertising from 2013–2018 (Fundar 2018). The effects of neoliberal deregulation are so severe in Mexico that in 2018 political and corporate lobbies legalised this discretionary allocation and derailed the efforts of the #MediosLibres collective, a group of NGOs including Fundar and Article19, who took a lawsuit to the Mexican Supreme Court (SCJN) ordering Congress to legislate on a regulatory framework for spending on public advertising. Finally, by preventing “a public service orientation” in journalism, underpinned by a “framework of public regulation” (Curran and Seaton 2009:338), neoliberal “free marketplace of ideas” and anti-licensing rhetoric has led in the Mexican context to a lack of public protection and safety for journalists, which, according to the #TenemosQueHablar initiative, has meant a lack of “basic labour rights, guild organization and unions, violence and harassment at work” in one of the most dangerous countries in the world for journalists (2022). Furthermore, data from the Knight Center at the University of Texas show that journalism is not only a high-risk profession but “one of the five worst paid jobs in Mexico with an average salary of approximately 7,973 pesos or 610 dollars per month. This salary has been decreasing in the last years” (The Media Ownership Monitor- Mexico 2017b).

Going back to the *apertura* model, in the wake of these contradictions, enthusiasm turned into pessimism, disappointment, and in some cases denial. This of course was not exclusive to the media “opening” model but formed part of and echoed a broader crisis in the political and intellectual horizon of Mexican elites: a lingering disenchantment with the regime of the “transition

to democracy” (Escalante Gonzalbo 2018b, 2018a). What went wrong? Why did old authoritarian ailments persist? A first, almost immediate response to this interpretative disorientation was articulated by Lawson and Hughes using the elements that were already to hand in the model. Mexico, they said, followed in the footsteps of a broader regional decline, an “unfulfilled promise of Latin America’s post authoritarian news media” (2005:164). This interpretation was naturalised through the authority of the Freedom House index ratings – an artifact which, as we discussed above, played a key role in the rhetoric of the Talloires coalition. The source of this decline was explained in terms of “barriers” and the deviant human and cultural components of the model: bad players, bad outcomes; virtue turned again into vice (ibid.:170). Founding civic entrepreneurs “lost their identity” and neutrality by becoming “ideologized” (Hughes 2006:239). Surprisingly, left to their own restraint, Mexican media owners and advertisers remained capitalist elites and pursued politics in their own interest. Furthermore, the optimal equilibrium between “too little or too much commercial competition” was not yet in place and therefore affected the market’s natural selection “overriding the need for credibility or investment in quality as a business model” (Hughes and Prado 2011:140–41). With the fatalism that was present in the roots of the diagnosis, it was concluded that “given the power of media companies and the short-term incentives of politicians, substantial progress towards reforming regional ownership regimens seems unlikely” in Latin America (Hughes and Lawson 2005:20). However, nodding again to the Talloires spirit, if political economy was not to be changed, progress was more promising at the individual level, “on the professionalism front”. For even though “most [Latin American] journalists have not yet acquired the range of skills necessary for them to take full advantage of the opportunities they enjoy, much less to systematically resist pressures” (Hughes and Lawson 2005:15, 20), there was still hope, since “traditional U.S.-style standards [were] on the rise” (Lawson and Hughes 2005:183). Alas, after all the 1990s enthusiasm for the prodigal son, the *bon-élève* remained culturally Mexican and not U.S.-like, hence the disenchantment and unfulfilled promise of what, under a neocolonial gaze, was considered an *apertura en tierra de indios* and a neoliberal media doctrine that required “imaginary reporters” to work.

3.5 THE MEXICAN CRITIQUE

A first critique of this transitional decline was articulated by Mexican scholars linked to the communication studies department at the Universidad Iberoamericana in Mexico City. In particular, Manuel Alejandro Guerrero and Mireya Márquez stressed what they called the “paradoxes” and shortcomings of neoliberal discourse. From the authors’ analysis followed a bleak scenario and an alternative model, which aimed to “challenge much of the existing assumptions about liberal markets” (2014:297), but at the same time implicitly showed the researchers’ perplexity at mounting contradictions that did not match up to hegemonic liberal theory. Where there should

have been the political neutrality of the market and private independence from the state, in Latin America the researchers observed “market-driven partisanship” (Márquez Ramírez 2014:285) and a “symbiotic relationship” “of mutually beneficial alliances and complicity between media barons and political elites” (Márquez Ramírez and Guerrero 2017:48). Unlike in the developed world, they said, Latin America presented a case where market-oriented reforms “paradoxically” empowered capitalists and not citizens, where “favourable conditions to a media *establishment*” or the “media class” “has not necessarily served the interests of media pluralism and democracy, but [...] the legitimization of political elites and consolidation of media conglomerates in the region” (Márquez Ramírez and Guerrero 2014:11). Additionally, their account described how Latin American civil society and local private advertising did not rise to the opportunity to support journalistic performance as it was *supposed* to. There was a lack of a “civic claim from below”, for “the penetration and weight of readership [was] low in comparison to other countries” so that the “elite-oriented press could hardly survive from private advertising or from readership alone” (Guerrero and Márquez Ramírez 2014:294,302). In the case of post-transitional Mexico, if a brief stint of media opening was possible in the 1990s thanks to the “economic reforms that diminished the state’s capacities” and established “the formalities of a predominant commercial media system” (Guerrero 2014:59), in the light of new events, this opening was in fact reinterpreted as a *hiatus* in a long continuity of collusion.

Thus, for these first critics, the reason the model did not produce the expected outcomes had to be an element external to the model. By adapting the concept of “state capture” used in behavioural economics and promoted by World Bank reports, the Ibero communication school mobilised an argument in which the liberal media model was “captured” by the exceptionalism of Latin American political systems. Moreover, the latter was explained in terms of atavisms: the region’s sustained legacy of “historical clientelism and informality” (Guerrero 2014:44,59), which is to say the “structural conditions of the post-colonial past in Latin America [that] mean[t] that the communicative *nature* of democracy is not in the service of the citizens, but of the elites, even through global discourses of freedom or professionalism”³³ (Márquez Ramírez and Guerrero 2014:10). And so, it was the weight of Mexican clientelist history and political culture that kept constantly distorting, interrupting, and capturing the otherwise straightforward democratic effects of the formal liberal model. A bad cultural context means bad outcomes: the game stays the same.

In turn, according to the captured model, this post-transitional reversion to the clientelist legacy affected the performance and professionalism of journalists. In particular, the narrative of a

³³ My italics.

Mexican civic professional mutation was contested, but it was replaced by the “hybrid *nature* of Mexican journalistic culture”³⁴ where “authoritarianism (tradition) and commercialism (modernity) have blended” (Márquez Ramírez 2014:275). And so, if the market’s natural selection and autonomy via popularity and profitability did not function correctly in clientelist countries (which had not civic, but clientelist private media owners) it was no surprise that after a short “opening” window, the Mexican premodern professional identity would succumb to “extra-journalistic criteria” and produce “collaborationist journalism” (*periodismo colaborador*) (Guerrero 2014:53; 2016:18) – a pejorative term associated with the disloyal act of working with the enemy during an occupation. Again, the reasons for this stagnation or decline in professionalism remained mostly individual and morally voluntarist: the complicity and lack of responsibility and “informative commitment” from media owners and editors to give their workers the guarantees and material support they needed; as well as the journalists’ ambition and “lack of professional consciousness” which prevented them from “interioris[ing] the deontological values and possess[ing] the necessary skills for a professional performance founded on basic principles”³⁵ (Guerrero 2016:59 footnote 12-13, 82).

In this sense, even though this first academic critique claimed its aim was to “de-Westernise the framework which underpins the normativity of journalism and theorise it within the geopolitical and social context of Latin America” (Márquez Ramírez 2012:201),³⁶ it arguably failed to do so for several reasons. First, it failed because its critique of neoliberalism’s outcomes in Latin America in general, and in Mexico in particular, functioned by naturalising the idea of an historical and cultural anomaly that was external to the model: a negative exceptionalism of the Third World. Hence, the theory’s main concepts – capture and hybridity – constitute the opposite side (the closing) of the same normative coin (the *apertura*), in that they are defined by what is missing (the lack of, the incompleteness), in comparison to the model’s reified pure ideal. This ideal is assumed to work just fine somewhere else in the world: in countries where journalistic culture is not hybrid but completely modern and properly commercial; in uncaptured media systems where neoliberal reforms have reduced inequality and private concentration of power; in un-clientelist societies where the “private vices [of media capitalists produced] public benefits”, and where, through the “defen[s]e of [the mass media’s] particular, individual and egoistic interests centred on profits, the global outcome could also be a very useful mechanism that helps sustain an open and pluralistic political arena indispensable for democracy to flourish” (Guerrero 2002:ii).

³⁴ My italics.

³⁵ My translation.

³⁶ My translation.

In other words, for the Ibero school, the neoliberal model failed in its own terms in Latin America, not because the model was in fact the *cause* of those democratic and public failures, but because since ancestral times this corner of the Earth has had a different hybrid *nature* – a recurrent and long-standing trope attached to the idea of *mestizaje* and often presented as “counter-discourse” by Latin American elites (Moreno Figueroa 2010:390). Alas, such is life in the tropics. And so, by thinking in terms of captured/free or hybrid/pure, the shortcomings of more than three decades of neoliberalism seemed indeed to be a contradiction, a paradox. Of course, as I have argued throughout this chapter, these immense imbalances, inequalities, and exploitations were not a paradox but *a direct result* of the triumph of the doctrines of free flow of information and the free marketplace of ideas, which, as the experience of the Non-Aligned Movement’s NIIO shows, used the professionalisation project as an effective way of relegitimising the market system and disarticulating any political resistance to it.

Moreover, this attempt at “de-Westernisation” was also trapped in a modernist telos. It is no coincidence that in the double special edition of the *Revista Iberoamericana de Comunicación* dedicated to the topic of “professionalism, informative quality and transformations of journalism”, the leading article regarding contemporary Mexican journalism presented a state of affairs “between modernity and backwardness” (*entre la modernidad y el atraso*). A burden whose weight increased within the country the more one ventured outside of Mexico City and into what, under a centralist perspective, is often called “the provinces” (*la provincia*) (González Macías 2011). This nods to other recurrent dichotomies of civilisation/barbarism mobilised in Latin America or to that “uncritical emphasis on modernization” and “clear and conscious desire to ‘catch up’ with the West”, which, as Dipesh Chakrabarty has pointed out, was part of the developmentalist style that has been present in decolonial politics as early as the Bandung Conference (Chakrabarty 2011:221).

Finally, I would like to return to Susan Benson’s (2006) formulation of “injurious naming” because the civic, competitive, and modernist teloi we have examined so far are not only theoretical shortcomings, but, most importantly, they are very effective instruments of power – as we have analysed above in the case of how the Talloires coalition weaponised international freedom indexes. Following Benson, I argue that we desperately need to abandon models that, by reproducing concepts or logics from evolutionary psychology or behavioural economics, end up mobilising “injurious names” – *colluded, collaborationist, captured, hybrid, uncivic* – as a way of interiorising fatalism and deviance, defining the “nature” of journalism in terms of “the West and the rest” (Hall 2019) in Mexico and other latitudes, under their various labels: *non-aligned, developing, Third World, Global South*. This is a vital task for advancing a true sociological understanding of the matter. To quote Audre Lorde, “the master’s tools will never dismantle the master’s house. They may allow us

temporarily to beat him at his own game, but they will never enable us to bring about genuine change” (2017:91).

4. COOPERATION BETWEEN COMPETING COLLEAGUES

Having contextualised and analysed the theoretical and political origins of the neoliberal professionalisation discourse, in the final two empirical chapters I focus on the interplay between these discourses and my participants' daily practice. As explained in chapter 2, I mobilise Beckerian network analysis and Eyal's concept of networks of expertise to show how an analytical framework of cultural production as collective action can help us move beyond professional boundaries and reconcile collaboration and interdependence not as deviant behaviours, but as hard-earned arrangements to solve real-life challenges, which most of the time are achieved despite the trouble and cost of breaking with professional discourse. In this chapter I study two instances of cooperation between journalists of competing media outlets, which took place around two whistleblowing platforms: the Panama Papers and Méxicoleaks. As I mentioned in the methods chapter, I first chose these case studies because they displayed an enthusiastic counterdiscourse of "radical sharing" and "collaborative and investigative journalism", which positioned itself as an alternative that directly opposed the competitiveness and individualism of neoliberal professional discourse, embodied in an ideal-subject which journalists characterised as the "lone wolf". In the following sections I will characterise both "collaborative" and "lone wolf" discourses, and subsequently use my ethnographic data to qualify the claims about the arrival of a new collaborative era, by showing that without the network arrangements necessary to secure and sustain cooperation, even iconic transnational collaborative projects like the Panama Papers can end up restricting collegiality and reciprocity.

4.1 THE ENTHUSIASM FOR A NEW ERA OF RADICAL SHARING

As I embarked upon my fieldwork, there were two discourses – two epics – being mobilised and seemingly clashing with each other at the public events I attended. On the one hand, there was the idea that, despite the extreme anti-press violence of the last 15 years, the Western form of investigative journalism had finally arrived in Mexico and the "detached watchdog" role was in fact flourishing in a small but professional vanguard. According to this reading, the Mexican press even had its own version of the classic Watergate scandal, when the investigative unit of *Aristegui Noticias* published "Peña Nieto's White House", which – together with the Ayotzinapa-Iguala massacre – marked 2014 as the *annus horribilis* for the Peña Nieto administration and the beginning of its electoral defeat four years later. It was not long before this investigative boom was being celebrated and promoted by Latin American and US-based prizes and donor organisations.

Simultaneously, there was another narrative, inspired by transnational megaprojects like Lava Jato and the Panama Papers, which saw in commercial media and their conventional professional culture of "individual pride, arrogance, competitiveness, and thus their overall inability

to ‘play in the sandbox with others’” (Lewis 2018:18) a pernicious “lone wolf” mentality. This discourse of “collaborative journalism” in turn mobilised another kind of epic enthusiasm. In her keynote speech at the 2016 Open Government Partnership Summit in Paris, Marina Walker Guevara (2016), deputy director for the International Consortium of Investigative Journalists (ICIJ), proclaimed a new model of “radical sharing”, in which:

just like the Panama Papers reporters changed their lone wolf ways and created a more efficient model of collaboration and trust... instead of following instinct, tradition, and their own egos, these journalists decided to share their scoops. Not just with one or two colleagues, but with dozens of them. In fact, with hundreds of them. Not just in their own countries, but in countries across five continents. And rather than race against one another they helped one another.

Moreover, in her keynote speech at the conference of Investigative Reporters and Editors, Sheila Coronel (2016), Academic Dean at Columbia Journalism School, proclaimed that “the era of the lone wolf” was over, replaced by a new “fluid and evolving” “network model”, which, “unlike traditional newsrooms”, was “horizontal and non-hierarchical” and whose members were “linked by bonds of reciprocity and trust, and also by self-interest”, so that although “units within the network may be competitive, they choose to share and to work together on specific projects and for particular goals”. There was also a technology-driven element behind “radical sharing” because it was said that this new model was a direct result of “the internet age” (Sambrook 2018:1) thanks to the abundance of information and “use of technology for secure communication and sharing massive amounts of data”, which, according to Coronel, made “network journalism” not only “flat” and “not vertical”, but “truly global” – a “true cross-border global journalism” (in Nakhlawi 2018).

As understandable as the need for this new collaborative epic may be for evangelising practitioners and attracting investors, what is problematic about this recent enthusiasm for “collaborative journalism” is that it draws on and uncritically mobilises the same techno-optimism placed for years now in the democratising and liberatory power of the “information society” or the “network society”. As shown by James Curran, the idea of a new digital era bringing down the corporate ancien régime and producing a “renaissance of journalism” has been a recurrent trope, not amongst counterhegemonic critique but as a “view now coming out of the heart of the news industry” (2012:22). Following Curran, the euphoric idea of a radical change whereby “creators and publishers embrace the collaborative power of new technologies” so that the “monopolistic industrial model of journalism is giving way to a pluralistic networked model based on profit and non-profit, individual and [reinvigorated and] organized journalistic practices” (*idem*) is problematic, because “networks are not inherently liberatory” (Fenton 2012:197) and because it assumes that the renaissance of journalism can occur without structural media reform, without changing the inegalitarian political economy that underpins media monopoly concentration.

Furthermore, as we have seen in the vignettes above, under collaborative discourse the best chances for “dethroning of traditional news controllers and the renewal of journalism” (Curran 2012:23) are explained in terms of individual psychology and professional culture – overcoming “ego”, “pride”, “arrogance”, “tradition” and “instinct”. Little is said about the reasons why freelancers, nonprofits, and local news outlets “can barely scrape the money for ambitious reporting” (Coronel 2016). Instead, collaborative journalism is presented as an innovation triggered by the scarcity of resources produced by the “crisis” of the media business model. In fact, collaboration is presented not as a critique of the assumption that “journalism is a business which is naturally competitive [or that] investigative journalism is an activity which normally seeks exclusivity” (Sambrook 2018:1), but as a commercial solution in itself for increasing audiences, revenues, impact, and producing a “spectacular return on investment” (Coronel 2016). In Walker’s words, “we had to show them [the media], it’s not only good for the story but good for their business” (in Nakhlawi 2018). Thus, as I showed in the case of the Mexican *apertura* model (section 3.4.4), this collaborative discourse also reproduced the idea of a professional mutation “emerging” from a vanguard of moral entrepreneurs, where profitability, self-interest, and market competition act as a mechanism of reproduction and dissemination, which ultimately cross-fertilises the entirety of media systems. All these problematic elements behind the enthusiasm for an “investigative boom” and “collaborative” radical sharing made me realise the limitations of the recent enthusiasm and epic discourse on collaboration, not as analytical lens sensitive to the collective dimensions and micropolitical relations present in all journalistic practices, but as a new trendy, niche, and elite genre of investigative journalistic projects.

Being critically aware of this gap between collaborative discourse and practice matters at least for two reasons. First, because there is always a risk that counterculture and attempts to resist may be forced to position themselves in the terms of the hegemonic discourse. Following Stuart Hall, this requires moving from an idea of power as something linear, “radiating in a single direction – from top to bottom” and “monopolized by one centre”, to one of relations that circulate and “permeate all levels of social existence”, where “we are all, to some degree, caught up in its circulation – oppressors and oppressed” (1997b:34). In other words, the techno-optimism of the information/network society and the professional ideal-subject behind collaborative “radical sharing” projects show how even those who try to challenge the “lone wolf” in their own terms can be trapped inside its binaries because, as we discussed in chapter 1, they “must position themselves as if they were the subject of the discourse” (Hall 2019:156) – thus locating themselves according to the meanings, terms, and norms of neoliberal professionalism. And second, and more importantly, because enthusiasm can fall into disenchantment and make the impulse and hope articulated around collaborative journalism a passing fad, one of the many buzzwords in the recent

proliferation of “adjective-journalism”, rather than a contribution to rethinking journalism without adjectives. As I show in my case studies (section 4.3 and chapter 5), without a sociological understanding of the collective dimension of practice – namely, the social relations and arrangements that must be in place to foster trust and new conventions – cooperation among networks can be discursively encouraged yet remain artificial if imposed from above: its radicalism tempered, its effectiveness lessened, and its endurance shortened.

Before moving onto the next section, where I dissect and attempt to denaturalise the “lone wolf” ideal subject, there are some political economy considerations to be taken into count to qualify the position of journalists towards the current collaborative counternarrative and international aid programmes promoting it. Often journalists are put between a rock and hard place, especially in concentrated and inegalitarian media systems like Mexico’s, where in the absence of democratic ownership and a public policy for media reform, access to international funding or donor-funded projects are sometimes the only way to develop collaborative special assignments. However – similar to what happens in academia with “interdisciplinary” requisites for grant applications – in the case of journalism, practitioners have pointed out that international funders and private donors “lead the pack in demanding that the journalistic projects they fund be collaborative” and increasingly “consider collaboration a prerequisite for funding”, which could risk sponsoring tokenistic or failed attempts (Kayser-Brill 2018). Moreover, the political economy of the international funding and donor-community is neither neutral nor innocent. As Irving Huerta has shown in the Mexican case, the need to “hunt” for grants puts journalists in the precarious position of “acquiesc[ing] to follow an agenda constructed from an office in London” and competing to attract international investors, who “are still in a position of privilege” to prioritise (with differing degrees of influence) applications embedded in their developmental values and approaches, professional benchmarks, and topical preferences (Huerta Zapién 2020:213–16).

Thus, as I will discuss in the conclusions of this chapter, it is important to remain critical of the asymmetric defining power held by international aid donors and the interplay between their professional discourses and political economy. Following Huerta, I agree that for Mexican journalists, “rejecting all international funding and all sorts of advertising altogether would be a bad idea” (*ibid.*:217), given the structural inequalities and constraints of the Mexican context. Yet let’s not forget that this model is no substitute for media reform, democratic ownership, and “the framework of public regulation underpinning a public service orientation” of the media (Curran and Seaton 2009, 338). Moving forward, a transitional strategy could be to keep the door open for international aid while applying political pressure on donors and the media system to move towards media reform. It is important to bear in mind that the priorities and enthusiasm of international aid fluctuate. What will happen to Mexican journalism the day funders and donors decide there are

more urgent humanitarian priorities in other parts of the Third World? Hence the need to build a public framework that can underpin norms and values outside of professional binaries.

4.2 THE “LONE WOLF” IDEAL-SUBJECT

In the following section, I study the effects of and ways in which my participants talked and positioned themselves according to what they call the “lone wolf”, which I argue is precisely the contemporary ideal-subject of neoliberal professionalism in their journalistic world. To make visible the interplay between professional discourse and practice, following Becker, I use ethnographic vignettes, conversations held in public, and social interactions through which we can empirically make sense of how journalists experience and interpret reality under a professional gaze. How does this discursive ideal-subject affect journalists’ relations with other key actors in their daily practice?

The analytical leverage of the lone wolf ideal relies not on the statistical number of journalists who can taxonomically be (self)identified under this category, but on its power as a conventional belief conveying what a “real reporter must do”. To paraphrase Becker, the lone wolf is “a set of ideas about the kind of work done by a real profession[al], its relations with members of other professions, the internal relations of its own members, its relations with clients and the general public, the character of its own members’ motivations, and the kind of recruitment and training necessary for its perpetuation” (1970b:93).

I first heard the term “lone wolf” during the 10 months I spent in the field in Mexico between 2017-18, mostly in the context of statements of liberation from a lingering old-school mentality, or in depictions of grizzled reporters. The lone wolf expression was part of the vocabulary of the journalists I both interviewed and followed in public forums, conferences, book-presentations, TV discussions on journalism, workshops, and informal gatherings of reporters held in Mexico City. The leitmotif can be summarised in the idea that more and more reporters (especially investigative ones) are abandoning the ways of the “lone wolf” (*lobo solitario*). Consider the following examples:

1) A former editor at *AM de León* and current senior reporter of Mexicanos Contra la Corrupción y la Impunidad (MCCI) commented in an interview:

for many years we journalists did this work as lone wolves, right, even sometimes working in secret, because we didn’t want others to know what we were up to. And we’re seeing that that’s changing. I’ll give you an example, in the Lava Jato case [...]. How can I access [the information] without networks? How can I cultivate the source in Brazil from Mexico? Without collaborating it’s impossible.³⁷

³⁷ Interview 18th September 2017. I have translated all quotes from Spanish to English.

2) The co-founder of *Ojo Público*, Peru, when invited to give a training session at the diploma programme and for the interdisciplinary seminar “Prensa y Poder” – both organised by Periodismo CIDE in late 2017 – included a slide likening journalistic practices to the social organisation of wolves (see also Figure 4.1):

nowadays many journalists say “I used to be a journalist who worked as a lone wolf, but now in this project I’m part of a team. It’s a pack of wolves and the pack’s strength is much greater than working solo”.³⁸

3) In 2013, at a major two-day international seminar packed with a critical mass of reporters, media executives, NGOs and renowned academics like Natalie Fenton, the then chief of the investigative unit at *Aristegui Noticias* – asked the audience:

why don’t we produce [long-term investigative pieces] in Mexico? Because we are a kind of lone wolf, where you have to do things on your own and sometimes in parallel to your agenda to keep working on a lead, regardless of what you are covering. This takes a personal toll, and it requires great personal commitment to be able to do it.³⁹

³⁸ This quote appears in Spanish on the slide pictured in Figure 4.1.

³⁹ Full conference available online: <https://www.youtube.com/watch?v=4YL1UESSjgc> (minute 21:36).



Figure 4.1: Journalists, from lone wolves to wolf packs (Source: @PeriodismoCIDE, 2017)

I soon realised that these accounts, and those of my other participants, shared some of the enthusiasm for “collaborative” discourse, but more importantly spoke to real-life challenges, precarious relations, ever-present risks, mistrust in colleagues, and a resented *loneliness*. If no one can be trusted in a world of rivals, lone wolf behaviour might be seen as the safest option. If no one knows and the information is kept secret, one cannot ask for support and resources from others, but at least the professional ideal of individual autonomy can be preserved. Alone or in packs, what caught my eye was the fact that, of all possible metaphors, journalists thought so naturally that their tribe consisted of wild, predatory animals – a “universal wolf”. After returning to Cambridge from fieldwork, I started realising this symbol was present in other contexts outside Mexico. I started hearing it everywhere. In fact, in conversations with daily news journalists from the United Kingdom, it had a similar “dépassé yet pervasive” connotation, as an experienced BBC Education Editor who worked closely with statisticians, academics, and reporters from different local media told me:

but you know I am maybe an example of an extreme collaborative journalist because some of my colleagues are more of a “lone wolf”, but I think there is a big risk in behaving like that because you

can make a lot of errors, whereas if you work with other people they can tell you if you are getting it wrong.⁴⁰

After digging further into the matter and collecting concrete pieces of information on whether this was the only sense the lone wolf conveyed, I found instances where it was used in a positive tone, as an expression of praise, precisely in the U.S. context. At the heart of the liberal tradition of media and press freedom, the lone wolf was regarded with admiration and nostalgia for a golden age of good old “shoe leather” journalism (Rosen 2015). As an ecumenical illustration, let’s consider for instance “The Journalist as Lone Wolf”, the review Alan Rusbridger (2018) – former editor-in-chief of the *Guardian* – wrote for the *New York Times* on Seymour M. Hersh’s memoir:

the lone wolf – in journalism, as in nature – is a rare creature. Many reporters prefer the reassuring comfort of the pack. But every age throws up a few hunters who prefer to go it alone, scorning the safety and consensus of the crowd. They are often noble beasts, even if they can present formidable challenges to their handlers.

Seymour M. Hersh (better known as Sy) is perhaps the most notable lone wolf of his generation. Now 81, he has nearly always operated on his own: There has been no Bernstein to his Woodward; no investigative team into which he could easily blend. He broke some of the biggest stories of his time. He fell out with editors. He threw typewriters through windows. He could be petulant, unreasonably stubborn, and prudish. But, boy, could he report.

This vignette is revealing in more than one sense. First, it performs a moral lesson from the public pulpit of the *NYT* between two elders of the journalistic tribe, two stars of the liberal tradition – Rusbridger, the seasoned editor from the Snowden case, and Hersh, the legendary reporter of the Vietnam and Iraq war crimes. From one editor-in-chief to a star reporter, Rusbridger’s depiction highlights the key elements of the lone wolf ideal-subject as praiseworthy. The lone wolf is the equivalent of a genius, an outstanding artistic talent – historically a unique and rare gem, which only a handful of individuals possess in generations (we all know there is only one Mozart and one Zuckerberg every hundred years). As an ideal of the journalistic subject, it is understood that not everyone can be like Sy, but everyone should try to: “society needs reporters like Hersh” (idem).

What distinguishes the lone wolf is that *he* alone (this rare creature is often White and an alpha male) can afford to be a rebel, but never a rebellion. He is notoriously a one-man army and cannot hunt in teams (even less so be part of a union or a network), nor take into account collective considerations or abide by common agreements, which are deemed dirty words, evoking a passive herd instinct or the comfort-zone of mediocrity. Under liberal theory, the lone wolf epitomises the aspiration to total professional autonomy as the individual maximisation of authority. Moreover, this being outside of the social is read as a virtue and a privilege because he is said to stand out from the pack and be able to challenge editors and ridicule reporters without many repercussions.

⁴⁰ Fieldnotes, 21st November 2018, Cambridge, UK.

He is so tough that he does not need and, in fact, scorns the safety and consensus of the group, and for this he is half admired and half feared by his colleagues, for he is “petulant”, “unreasonable”, and aggressive. All of this ferocity can be overlooked and downplayed socially (the euphemism used in the text is that of being “a difficult reporter”) because the lone wolf is regarded as a “noble beast” – a holder of honour – and after all, a genius: all cantankerousness and sometimes even methodological faux pas⁴¹ are tolerated if he delivers the glory of the scoop (“boy, could he report”).

Of course, the liberal reading of the lone wolf is inextricably linked to the Anglo-American tradition, for which the construction of the Watergate myth is key. Hence, Rusbridger’s reference to Woodward and Bernstein, the reporters from the *Washington Post* who broke the news on the Watergate scandal and whose own account of their involvement became a best-selling book and blockbuster film, *All the President’s Men*, which to a great extent contributed to their apotheosis and the construction of a heroic journalistic mystique. As Michael Schudson has pointed out, the Watergate myth is about “two lone reporters” performing “the myth of David and Goliath, of powerless individuals overturning an institution of overwhelming might [Nixon’s presidency]” (1992:104–8). Just as young David represents the nation of Israel in the parable, Woodward and Bernstein are portrayed as the perfect synecdoche for the U.S. press at its best, a story where “the press, truth [David’s sling] its only weapon” *singlehandedly* “saves the day” (1992:104). Where the Israelites were scared and dared not step forth against Goliath, the lone wolves’ competitive appetite and tough ferocity made them stand out from the pack. And so, in the words of Leonard Downie (one of the editors involved in the Watergate coverage), “a few lonely individuals within that lonely newspaper who acted in ways *uncharacteristic* of the press in general”⁴² are constructed as a moral asset, as a symbol of journalistic “initiative and bravery and enterprise” (in Schudson 1992:109).

Certainly, in order to inspire and be remembered and socially effective, like any other professional discourse, the Watergate myth had to minimise aspects of reality, or systematically ignore the parts of journalistic practice that do not fit into the heroic discourse, or that include people from outside the boundaries of the journalistic field. For instance, during almost a year from the 1972 presidential election to early 1973, the Watergate coverage was ignored by the vast majority of U.S. media outlets and Washington correspondents (Schudson 2004:1233) and “the press as a whole was, as before and since, primarily an establishment institution with few ambitions

⁴¹ For a summary on Woodward’s controversies see Schudson (1992:120–23). See also some of the critiques on Hersh’s latest work: <https://www.washingtonpost.com/news/morning-mix/wp/2015/05/13/seymour-hersh-journalism-giant-why-some-who-worshipped-him-no-longer-do/>.

⁴² Original italics.

to rock establishment boats [and] as a whole did little investigating and showed little courage” (Schudson 1992:105,123). Contrary to the myth, the U.S. press was only one actor in a network formed by government officials, judges, politicians (including Republicans), Congress committees, intelligence agencies, etc., without which the news would not have come about the way it did or even been kept alive long enough to turn into the model of political scandal in the West. The Watergate myth is mobilised not only by the minority of journalists who work in the “luxurious” suburb of investigative reporting – which “is not today a priority for most [media] institutions nor has it ever been” (Schudson 1992:119) – but it is a sustaining symbol at the heart of the sacred citadel of professionalism, the centre of the Western journalistic world (Zelizer 1993).

For the liberal media model, Watergate, My Lai, and the Pentagon Papers, to mention just a few, constitute a framework of “watershed moments” (Freije 2020), which are seen as the pinnacle of professionalisation and are embedded in a professional conventional belief. Echoing the individualistic genius or “big man” theories analysed above in the case of “civic entrepreneurs”, the lone wolf is crucial to this professional discourse. The “free marketplace of ideas” and its increasingly inegalitarian political economy can produce severe distortions in global information and communication flows, but all structural shortcomings are redeemed if every so often the model allows virtuous individual anomalies, wherein lonely practitioners manage to embody the profession’s mandate – a discourse that would sound odd if one were to say, for instance, that “in the midst of a collapsing health system a single medic cured cancer” or that a “lone virologist defeated COVID-19”. In this sense, the Watergate myth works as a professional *raison d’être* because it implicitly establishes a jurisdictional narrative where it is understood that “no one else but a journalist” – and not any kind of journalist, but a lone investigative wolf – could have done this important social task: not producing news but bringing down a tyrant, which has been the formula in every “-gate” iteration ever since (from Nixon’s original case to Enrique Peña Nieto or Dilma Rousseff).

Furthermore, as we saw in the historical chapter, in the same years as those big scandals – the 1970s and early 80s – the U.S. and U.K. governments under the Talloires coalition were aggressively pushing their global “professionalisation project”, in which the lone-wolf-in-Watergate discourse became a key export of the First World and a pinnacle only achievable in “free”, “democratic”, and “developed” countries with a liberal, unregulated, market-driven, yet independent media. In fact, Watergate was presented as “a triumph not only of American journalism but of the American system of a free press” (Schudson 1992:125).

Of course, Latin America, like many other parts of the world, was not impervious to the hegemony of this Anglo-centric deontological export. For instance, we have discussed how in the Mexican context this mythological norm shines brightest in Chappell Lawson’s “*apertura*” and Sallie

Hughes' concept of "civic entrepreneurs", which responded directly to this Anglo-American discourse, and conversely explained the "barriers" to and shortcomings of full professionalisation in terms of a persistent Mexican deviance of journalists who were either too "ideologised" or "looked at Wall Street rather than Watergate for inspiration" (Hughes 2006:42). At a regional level, Silvio Waisbord has shown that this professionalisation discourse from the Global North has been hugely influential in Peru, Argentina, Colombia, and Brazil. It has worked as a benchmark among journalistic elites who were most exposed to the U.S. circuit of professional training, j-schools, and philanthropy. For the Latin American "sons of Watergate" (Reyes 1995), it was common sense that replicating the deeds of "Woodstein"⁴³ was every journalist's dream:

South American watchdog journalism is filled with references to Watergate.⁴⁴ Its presence is detected in multiple forms. As a cultural and political referent, Watergate is many things simultaneously: a source of inspiration, a language, a script, a master narrative of journalism, an image bank. (Waisbord 2000:170)

In this sense, under the liberal model, praise of the lone-wolf-in-Watergate still works as a promise and a useful framework that practitioners can invoke in various circumstances as part of a defensive professional-speak, because "Watergate' holds a place in their understanding of what their job is and what it might be, what the significance of their work is and what it might be" and at the same time it "offers journalism a charter, an inspiration, a reason for being large enough to justify the constitutional protections that journalism enjoys" (Schudson 1992:124–25).

However, if the investigative lone wolf is seen from the Global North with such praise, as a pinnacle of "professionalism, vigor and courage of individual journalists" – to quote the Talloires declaration – why, then, did my participants talk about the lone wolf's attitude and behaviour as *dépassé*, something one has to be liberated from, an obstacle that hinders their work (especially collaborative investigations) and relations with other significant actors? Is it possible to criticise the lone wolf ideal subject without rethinking, and in a way desacralising the profession's investiture, without lifting the veil and facing what Becker called the pathologies of the discourse of professions? How could both discourses coexist? To what extent were these efforts to abandon the lone wolf ideal-subject instances of critical resistance in the midst of the neoliberal turn in professionalisation?

⁴³ The power-couple nickname used sometimes in journalistic slang for Woodward and Bernstein, which I find fascinating because it shows that even when reporters work in pairs or a small team, the idea of a single lone wolf tends to prevail.

⁴⁴ Waisbord even recounts how Argentinian media outlets tried to associate themselves with the protagonists of Watergate to build their own reputation and paid "a reportedly substantial sum of money to Carl Bernstein to write a report on the state of Argentine journalism after *Noticias* (and *Página/12*) broke major scandals that shook the Menem administration in the early 1990s" (2000:173).

What I found in my fieldwork was something much messier. I soon realised that the lone wolf was not a mere rhetorical trope, nor a simple description of introverted, cranky, or standoffish personalities, but a professional symbol deeply rooted in the liberal “opening” (*apertura*) and the “transition to democracy” narratives, which remain today the knowledge horizon by which most of my participants make sense of the Mexican journalistic world. Following Emerson et al.’s observations about in vivo terms, by looking at everyday interactions where behaving or not as a lone wolf made sense for journalists, I have attempted to “trace out the intricate local knowledge” that underlines the uses of this term and the micropolitical work it takes for journalists to reproduce or change their practices (1995:155–57). The following subsection provides the first systematic study of the concrete settings in which the lone wolf ideal-subject manifested itself.

4.2.1 THE WOLF IS ALONE. THE REPORTER’S RESENTED LONELINESS AND DESIRED SOLITUDE

Let’s start with the most obvious aspect, the defining adjective in the name of this ideal-subject: the “lone” character of the wolf and the interplay between resented loneliness and desired solitude. I first became aware of this facet in my early days of fieldwork in August 2017, when, thanks to my affiliation to Periodismo CIDE, I was granted access to the international symposium “Modelos de Organizaciones de Periodistas” organised by the nascent Agenda de Periodistas initiative (Agenda). As explained in the Introduction, Agenda was launched in May 2017 as an immediate reaction to the assassination of Javier Valdez Cárdenas, the renowned correspondent and co-founder of Sinaloa’s weekly paper *Ríodoce*, and to the accumulated grievances of over a hundred murdered journalists since 2000 and the staggering rise of other forms of anti-press violence.⁴⁵

In less than a month, Agenda had swiftly called an assembly in mid-June, which was impressively attended by over four hundred journalists from 20 Mexican states to discuss a common diagnosis and draft their basic demands in an intense three-day work meeting in Mexico City. Contrary to other Latin American experiences, this was a huge and rare event in a divided journalistic world like Mexico’s, which, besides resilient but scattered local support networks, has no operative national trade unions, coalitions for media reform, or political organisations to articulate the demands of journalists. By August, Agenda’s third major meeting took the form of an international symposium, which was livestreamed and attended by 50 journalists, and revolved around listening to and comparing Agenda’s ideas and practicalities with the experience of representatives from the most renowned guild organisations in Latin America: Fundación para la Libertad de Prensa and

⁴⁵ *Artículo19*, “Periodistas asesinadas/os en México, en relación con su labor informativa”, <https://articulo19.org/periodistasasesinados/>

Fundación Nuevo Periodismo Iberoamericano (Colombia), Instituto Prensa y Sociedad (Perú), El Faro (El Salvador), Foro de Periodismo Argentino (Argentina) and Associação Brasileira de Jornalismo Investigativo (Brazil), as well as international advocacy organisations like Open Society Foundations and the Global Forum for Media Development.

In the opening remarks, Ismael Bojórquez, one of the late Javier Valdez' closest friends, and director and co-founder of *Ríodoce*, decided to share one of his memories of Valdez, which was revealing in more than one way. Charged with a solemn symbolism, Bojórquez' words hit a deep nerve in the professional culture. Little did I know that that precise feeling would be a recurrent emerging theme all along my fieldwork, a leitmotiv heard in different settings, shared by most of the journalists I talked to:

Javier Valdez used to say, he always complained, that journalists were alone. Especially that journalists, he said, were working our asses off in the streets, reporting this inferno – I'm quoting him – and that we were alone. That society had left journalists on their own. Javier and I didn't discuss this [...] part much in *Ríodoce*, this conviction that Javier had about journalists being left on their own. The team members of *Ríodoce* and I have also felt this especially when we've encountered conflict. In 2009, for instance, they threw a grenade [at our newsroom], and we didn't feel that warmth [...]. We really felt that we were alone facing such an extreme situation [...]. So, Javier died with that sorrow [*clears his throat*]. I have collected the opinions of some colleagues on this loneliness of independent journalists, of journalists who are in the streets, fighting, and so on. And their explanation is that somehow, we – as journalists or media – we leave society on its own in many things.⁴⁶

The sorrow of loneliness is the first half of the same professional gaze. There are several insights in Bojórquez' and Valdez-via-Bojórquez' interventions. First, both accounts come from a place of sadness and yearning, expressed in ceaseless “complaining” that nevertheless remain an individual (not collective) and private (not public) dissatisfaction, for its roots are not “discussed much” even among everyday peers. This loneliness is something that journalists feel in the flesh, and which anti-press violence puts in the highest of contrast. In those extreme moments of need, the recipients of this complaint and longing are not so much (or at least not in the first place) other journalists or media owners (as in, professional peers or the industry) but lay “society”. From the general public to clients/users or audiences, not to mention advocates and social movements,⁴⁷ it is this broad cluster of non-journalistic actors that comes to the journalists' minds as the significant other whose absences and abandonment matter most as a source of legitimacy in hard times. It is also interesting how loneliness is recounted in such total terms that what is mentioned as being yearned for is something so delicate and minimal as the feeling of “warmth” (*calor*). Coming in from the cold, journalists long (again, at least in the first place) for society's company and recognition (often referred to in terms of *arropar*, to wrap up warmly), expressed in symbolic

⁴⁶ Fieldnotes 10th August 2017.

⁴⁷ Interestingly enough, there are no mentions of political-partisan actors or political representation.

gestures and warming words of solidarity (a phone call, a signed public statement, spontaneous protest,⁴⁸ etc).

Moreover, I would like to point out that this loneliness is especially distressing for professional discourse because it is a sorrow experienced by a very particular type of practitioner: *independent* journalists. For the discourse, it seems reasonable to expect society's abandonment for cynical or opportunistic journalists – those who, as in any other occupation, deviate from professional ethics and its social mandate. But what puzzled the Mexican journalists in the room was that society could *also* leave alone those journalists who, in their eyes, were worthy of being called “independent”, which in the guild's vernacular is often a synonym for professionalism and virtue. In Borjórquez' account, “independent” is described as reporting on foot in the streets (*calle*) with all the hard work, first-hand proximity, and dangers that endeavour entails in a context of violence (*el infierno*) and precarity. Again, the societal loneliness discussed in the Agenda's forum was not the one of distant, disreputable, or snobbish sell-outs, but of courageous reporters in the states doing their best with what they have; working against the tide (*luchando*), putting their body on the line (*poniendo el cuerpo*), at very high personal risk and sacrifice – all elements of that kind of devotion and vocation that Durkheim, Weber, and Said deemed so important for the self-image and ethics of professions.

For the independent journalists, their loneliness and society's indifference have a contradictory, undeserved, and frustrating character. How could one do things right professionally and still end up alone, without social trust or support? The “loneliness question” remained open, obfuscating journalists. Later that day it was brought up in a slightly different manner in the Q&A of the final panel, while discussing Agenda's lines of action with the Latin American guest speakers. Two middle-aged Mexican journalists took the floor (later I found out they were seasoned and respected reporters working in major left-wing national media outlets in Mexico City, who also participated actively in collaborative projects and in building bridges among colleagues):⁴⁹

Mexican journalist 1 (MJ1): there's a lack of awareness or a lack of sensibility [in society] about why it's so serious to kill a journalist. Then you understand that there's a disconnect between our struggle, our drama, and the way society is perceiving our struggle, and so the idea is to establish that communication with different sectors of society and get some support. When we talk about that feeling of loneliness, right, of feeling like we're locked in our own struggle, unaccompanied by society, I think that's what that sort of remark is getting at.

Mexican journalist 2 (MJ2): I think there is a feeling of loneliness, like MJ1 was saying, a strong one. I mean they kill us, when they killed Moisés Sánchez a protest was organized on Twitter and 12 of us attended [...]. When it happened to Miroslava [Breach] or Javier [Valdez], [the protests] were bigger... but we were still a fraction in comparison to the protests we're used to covering! And almost all of us

⁴⁸ My participants often made comparisons with the Paris protests following the *Charlie Hebdo* attacks.

⁴⁹ Little did I know that by the end of my fieldwork MJ1 would become a good friend and a key gatekeeper and constant interlocutor, to whom I owe a lot of my immersion and understanding.

journalists. It's clear there's a split between society [and us], they don't feel like they have to come and support us, so we feel alone.

These interventions echoed one of Agenda's three main lines of action, which involved designing effective communication campaigns to "sensitise citizens to the importance of journalistic work" and "make more visible anti-press attacks". Under this reading, the responsibility and the answer to the loneliness question is transferred to lay society, who is portrayed as a passive actor with a false or incomplete consciousness – not knowing who or what is in their best interests and therefore needing to be educated on the reasons (often based on the abstract and normative language of rights, civil liberties, and democracy) why journalists' services ought to receive special treatment and recognition. Following Becker, this interpretation is not exclusive to Mexican journalists but a recurrent trope in professional discourse where "professions feel strongly that their work is hampered by the interference of laymen who do not fully understand all the problems involved, the proper standards to be used, or the proper goals to be aimed for" (1970:97). In a nutshell, according to this explanation, the loneliness of independent journalists is a matter of society's perceptions, which could be corrected by putting across the right message to enough people. Moreover, for this "perception" campaign to have become one of Agenda's main lines of action shows clearly that it was a conviction shared by a substantial part (if not the majority) of the journalists who participated in Agenda's working groups in the July assembly.

However, this "pedagogical" reading was not unanimous. In fact, it was subsequently addressed by an Argentinian journalist, who was invited as FOPEA's representative (FR) and gave the following exchange:

FR Perhaps you should fight that feeling of loneliness not by calling a protest, which only 12 people will go to, but by *you approaching* other societies in the civic sphere, other civil societies and explaining to them what your struggle is and about your need for these civil society organisations to accompany you... and start to build from there.

MJ2 [interrupting] But then they demand loyalty from us,

FR But it's not, no no, no no...

MJ2 they forget that we're journalists, they tell us "we'll support you in your mobilisation, if you support us in ours"

FR OK, but then again, in a way that's how societies work, someday someone's going to come and ask you for your collaboration and you need to be there, as long as the collaboration they're asking you for is reasonable, true, honest, so to speak... But you need to start looking for allies in those sectors, which are the ones that can contribute.

Let's break down this conversation in parts. First, we are dealing here with an alternative reading, one based not on raising awareness, but on reciprocal exchange and dialogue. Notice the importance FR gives to the subtle political work needed for the construction of alliances and collaboration. The relationship with the "outsider", with non-journalistic societies, is negotiated and reached by compromise rather than through education or lecturing. Trust and support are earned (cultivated via a personal connection and (re)assessed throughout time), and not taken for

granted as a natural consequence of “independence” or the adherence to one’s professional codes. In this sense, civil societies (the lay others) are portrayed as active players capable of granting or withdrawing support, not according to their moral obligation or level of understanding of journalists’ mandate, but to the extent to which mutual agreements, pacts and trust are established and fulfilled reciprocally. Thus, under this alternative “reciprocity reading”, responsibility is not transferred but assumed (in Weberian terms) and re-signified from unilateral to mutual. This symbolic distinction can be seen in FR’s emphasis on the need for journalists to make the first move, “to approach” (*acervarse*) potential allies, coming from a place of humility and interdependence rather than the “they don’t feel they have to come and support us” tone of MJ2’s first intervention. If, under what I call the pedagogical reading, the loneliness of independent journalists is seen as an undeserved, resented, and frustrating contradiction, looking at the world through the lens of reciprocity makes society’s behaviour reasonable and journalistic reflexivity possible. This nods to Bojórquez’ last reflections where he mentions having “collected the opinions of some colleagues” and reached the collective insight that their loneliness responded to reciprocity being out of balance because “somehow, we, as [independent] journalists or media, we leave society on its own in many things”. And naturally the follow-up question would be: what are those “many things” and in what ways do independent reporters leave society on its own? And is this imbalance in reciprocity connected to their professional discursive practice?

As revealing as these initial instances of reflexivity might be, what is also clear is that the reciprocity reading almost immediately hit a brick wall in the conversation between FR and MJ2. As a counterargument, MJ2 referred to previous attempts at reaching out to civil society for support, which were described as a failure for one main reason: allies ask for things in return, and one thing in particular: loyalty. This strong, constant, and mutual support is deemed unacceptable, something that independent journalists cannot allow themselves to give or show publicly under risk of being called unprofessional, political, biased, partisan, or activists, and in that sense reciprocity and loyalty are seen as dirty words. This is explained by invoking an exceptionalism for the journalistic profession. Notice how for potential allies to even ask for loyalty is deemed an unfair and tactless faux pas, something lay people ought “not to forget”, which – under the pedagogical reading – shows their lack of understanding of what “being a journalist” – a true professional – really entails. Here professional autonomy is preserved and preferred at all costs as an individual prerogative, a jurisdiction of one, even if the price to pay is loneliness. To illustrate this melancholic dilemma, let’s learn from the memory of Javier Valdez and think of the deep meanings behind the image of “a sign that Javier had made [that] was still fixed to the outside wall of his cubicle [at *Ríodoce*]. It read: ‘Investigation Unit/(Unit of one)’” (Grecko 2020:199).

If loneliness is resented and felt as sorrow, this uncompromising exceptionalism is a desired professional *solitude*, worn as a badge of honour. Here is where the lone wolf as a professional ideal-subject comes into play. As I show in chapter 2, there is a risk of depoliticisation implicit in the professional ideals of creative genius, jurisdictional competition, and individual autonomy, since professional ethics and honour rely on “perform[ing] duties *sine ira et studio*, ‘without anger or partiality’” (Weber 2020:131). I argue, following Weber, that solitude is desired and loyalty abjured because the professional ideal-subject requires journalists to preserve the detached “objectivity” of professionals, whose social authority depends on cultivating a “view from nowhere” (Rosen 2003, 2010) and an image of performing their tasks dutifully and impartially according to the logic/ethics of their own profession (above the political arena or personal positioning). This has the effect of transferring responsibility towards the means by which duties are performed, rather than towards the ever-present need to legitimatise those duties’ ends.

Furthermore, I make the case that the dichotomy of desired solitude and resented loneliness points to the pathologies of professional discourse and its gap with real-life challenges. In fact, this depoliticisation clashes with the journalists’ longing for allies, precisely because journalists are political actors and their work (the mere fact of choosing what is newsworthy) entails a political stance, a public positioning and a struggle *within* the political arena, thus their actions bear a political responsibility that cannot be merely *transferred* to the refuge of technique and the “depoliticised” impartiality of professionals following “strictly journalistic interests or criteria” or “just informing”. I argue that this is so because in order to be trusted, believed, and followed (in short, to have the legitimacy to represent society and ask for necessary social and public support), journalists (like any political actor) cannot stand above, but only *within* the political arena. They must *stand* for something, *take* the risk of “putting themselves out there”, have a view from *somewhere*, advocate for something bigger than their profession. This, of course, does not mean that in real life all political actors succeed in being trusted and followed, nor that their actions are always guided by an ethics of responsibility, which would imply normatively neglecting the real possibility of cynicism and rhetorical opportunism (Roudakova 2017:Chap.4). My point, following Weber, is that preserving the image of professional virtue (the mask of depoliticised impartiality and the particularistic and procedural transfer of responsibility) can be simultaneously an effective defence mechanism *and* a limiting trap for making allies, building public trust, and overcoming the loneliness of the independent journalist – something that, as we have seen in the case of Agenda, is a matter of utmost importance to all the journalists I know, especially in such dire times.

As the abovementioned debate among independent journalists shows, depending on their circumstances, some journalists manage to acknowledge their positioning in public – a view from *somewhere* – as a strength and not an “unprofessional” weakness, which in itself is a political act,

similar to the Greek concept of *parrhesia* used by Natalia Roudakova to talk about “the practice of frank and courageous speech delivered at the risk of angering a majority or a more powerful interlocutor” (2017:19). Of course, not every journalist can dare to do this: many keep the political dimensions of their work private, or repressed and dissociated, because the backlash of being called “militant”, “activist”, “biased” is real; because adherence to professional discourse is a safer and effective “strategic ritual” (Tuchman 1972); because the straitjacket of depoliticised professional rationality is real and makes courageous *parrhesia* costly and rare; it makes their standpoint and “view from somewhere” taboo.

4.3 COLLABORATION: SAME ACTORS, DIFFERENT OUTCOMES

And yet this does not mean that journalists are incapable of being gregarious social beings, working together and making alliances. This is so because the “rule of professionals” is never complete nor definitive, and there is a relative indeterminacy in the power of dominant professional discourse and conventions. In practice, unconventional behaviour is not impossible – only riskier, more difficult to navigate. In everyday life journalists *work within* the political arena and this work and these interactions can transform them in a meaningful way, precisely because they are capable of responding to other logics and obligations which transcend their professional boundaries. In fact, as I will explore in the following sections, more institutionalised forms of collaboration have occurred within the journalistic world in Mexico, as shown in the cases of Méxicoleaks and the Mexican experience in the Panama Papers. How did these projects manage to create the conditions for the sustainable participation of certain actors in the network? How was access to privileged information negotiated? What was the process by which they arrived at ways of working together and solving common problems? What are the politics of these collaborations being initiated by outsiders to the Mexican media system? How does this relate to the politics of professional discourse?

4.3.1 NETWORKS

The year was 2015 and as so often happens, external influences changed the conditions in which competition and collaboration were perceived among a handful of Mexican journalists, who were recruited or granted the opportunity to be part of two then unheard of, but interesting-looking projects. In the first case, the previous year two non-profits based in the Netherlands and Iceland – Free Press Unlimited (FPU) and Associated Whistleblowing Press (AWP), respectively – used their connections among human rights activists and journalists in Mexico to scout out and train a group of eight media outlets and NGOs (Figure 4.2 shows the organisations involved). In their eyes, the selected organisations had to have enough independence and a good enough reputation

among citizens and whistleblowers to receive leaks and develop them into news via an encrypted platform called Méxicoleaks, which was eventually launched on 10th March 2015.



Figure 4.2. Organisations and media outlets involved in Méxicoleaks and the Panama Papers in Mexico [Digital image].

In the second case, months later in mid-2015 the International Consortium of Investigative Journalists (ICIJ) – a global network of reporters and media organisations founded in 1997 and based in Washington DC – contacted seven Mexican journalists from *Aristegui Noticias* and *Proceso* (see Figure 4.2). Along with more than four hundred journalists from one hundred media partners all over the world, they were invited to index, analyse and produce stories from a leaked database of 11.5 million documents of a Panamanian law firm – Mossack Fonseca – specialised in creating shell companies and layered corporate structures in offshore jurisdictions to conceal ownership of assets, as well as financial and fiscal wrongdoing.⁵⁰ In contrast to Méxicoleaks, membership in the Panama Papers project was not granted to media outlets, but rather to particular reporters. Based on references from existing members, the candidates' career and work were assessed by the ICIJ's Network Committee – the body in charge of adding or excluding members – and they were asked to sign a non-disclosure agreement.

Both FPU and the ICIJ, as holders of the encrypted whistleblowing platforms and collaborative digital software to communicate and share the leaked documents, were able to establish principles of non-exclusivity and sharing as a condition of membership, even despite initial resistance from some of their partners. For instance, the *New York Times* did not participate in the Panama Papers since the ICIJ collaborative model did not guarantee exclusivity for a particular media partner. Similarly, reporters from *Proceso* told me that securing exclusivity was the magazine's initial strategy in the pitch meeting with FPU, which later managed to convince them otherwise.

In sum, the networks involved in both projects were chosen through a selective recruitment process and, at all times, the final decision of whom to grant access to information and passwords to the databases rested on the external organisations. The second aspect that mitigated the uncertainty and risk of data being accessed by someone from outside the network was the reaching of a common agreement, which, in the words of Frederik Obermaier – one of the two reporters from the German newspaper *Süddeutsche Zeitung* who first received the Panama Papers leak – meant: “encrypt and shut up. Basically, encrypt every communication, every data you store on your computer. Encrypt it and so protect it. At the same time, shut up. Don't speak with people. Don't speak with colleagues in your media outlet that are not involved in the project because this is a very sensitive area” (Reveal 2017).

Even if in later stages – as we will see below in further detail – the collaborative process relied more on flexible negotiations and informal personal relationships of trust, it is important to

⁵⁰ For further detail about the global investigation and its impact, see: <https://www.icij.org/investigations/panama-papers/pages/panama-papers-about-the-investigation/>.

note that both projects contemplated potential sanctions: from the reputational costs of being seen as unreliable or untrustworthy, to being excluded from the project and its resources. As a reporter from *Proceso* who was deeply involved in both projects, puts it, “there were never transgressions, because they could expel you and honestly that would be looked on very badly because you’ve got a hundred media outlets watching [in the case of the Panama Papers]”.⁵¹

4.3.2 MOBILISED RESOURCES

At first glance one might think that the main appeal of complying with all these agreements and constraints was mere access to privileged information. However, a closer look reveals that other valuable resources were mobilised and both types of leak involved different challenges and qualities.

Nevertheless, in both cases the journalists involved had great expectations for what they might find in the data. On the one hand, the Panama Papers (or Prometheus, the codename assigned at the time to the database) had the accumulated expectation built upon similar ICIJ revelations – China Leaks, Lux Leaks and SwissLeaks – and, in the words of Marina Walker Guevara (2016), it was “the kind of revelation that would make any reporter a superstar”. On the other hand, Méxicoleaks built up great expectations because, five days after it was launched, Carmen Aristegui and the team that investigated the high-impact piece on President Peña Nieto’s Casa Blanca⁵² were sacked from their daily news radio programme. The scandal attracted so much public attention to Méxicoleaks that in a matter of days hundreds of leaks – documents, exposés, etc. – began to be sent to the platform. As some of the reporters involved in the project recalled, “there were great expectations about what might turn up here [at Méxicoleaks]” and everyone more or less expected at the beginning “that the great revelation, the big leak would be sent to her [Aristegui]”.⁵³

However, it is important to distinguish the difference in data and resources between the two projects. Firstly, the Panama Papers constituted a data mining challenge to find newsworthy stories within 2.6 terabytes of emails, contracts, passports, and banking statements from the dense offshore network that the law firm Mossack Fonseca had built with its customers during 40 years of dealings. To search the database, the reporters were trained and had access to tailored tools, shown in Figures 4.3 and 4.4, such as a search-engine (Blacklight), a “collaboration and communication platform where contributors formed interest groups, shared discoveries, and

⁵¹ Interview, 1st November 2017.

⁵² *Aristegui Noticias*’ most famous piece, “Peña Nieto’s White House” (November 2014), documented in detail the interwoven relationships and businesses between the President, his family, his political entourage, and corporate contractors who had benefitted from multi-million dollar public bids to build major infrastructure projects during his administration.

⁵³ Interview, 25th October 2017.

exchanged ideas” (I-Hub), and a “visualization system that provided visual graphs of the relationships between entities mentioned in the leaked documents” (Linkurious) (McGregor, Watkins, and et al. 2017:506).

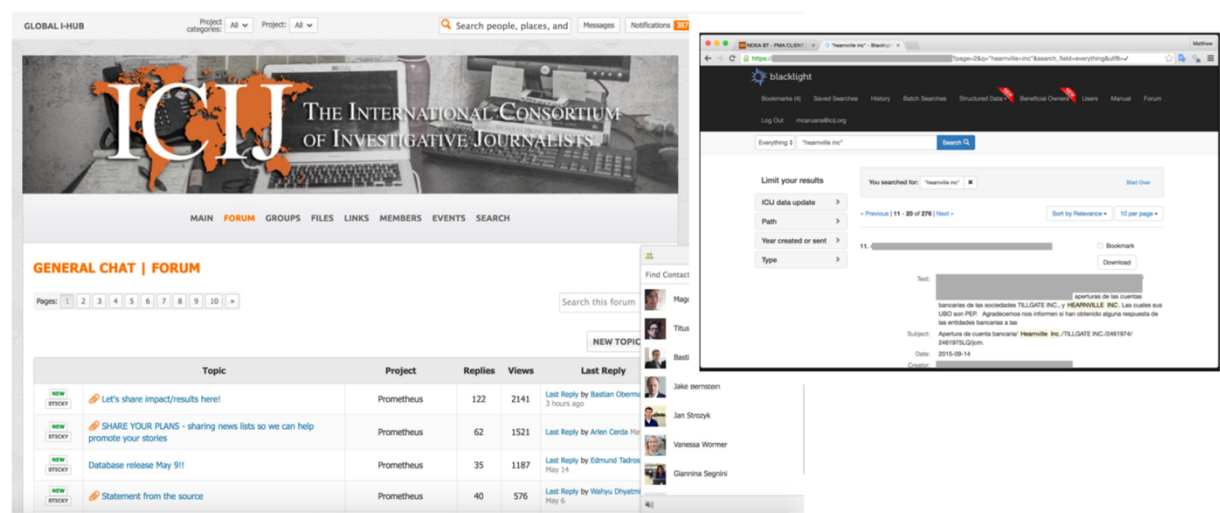


Figure 4.3: Screenshots of the collaboration and communication platform I-Hub (left) and the document search-engine Blacklight (right) (Source: McGregor et al., 2017)

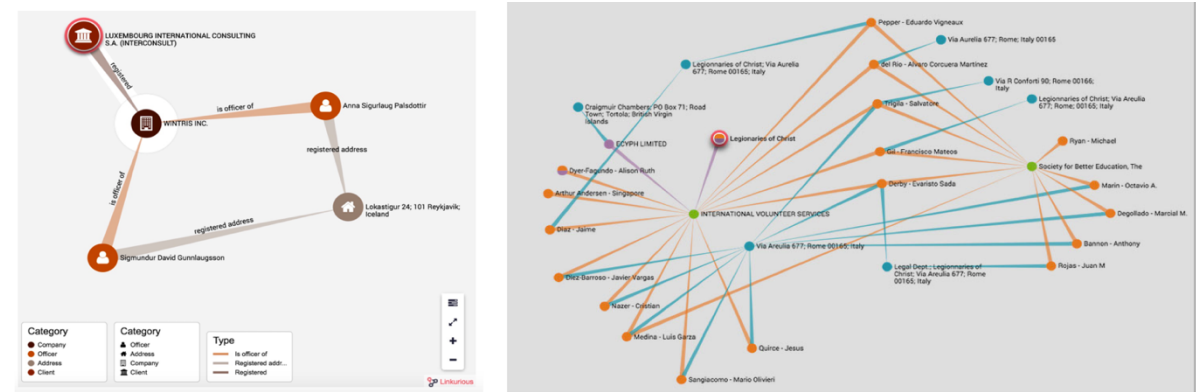


Figure 4.4: Screenshots of the system Linkurious that visualises links between entities mentioned in the Panama Papers documents (Source: McGregor et al., 2017)

In contrast, Méxicoleaks was less a case of looking for a needle in a haystack, than of verifying the authenticity and assessing the public interest and feasibility of the most varied types of leaked information about all sort of topics: from unjustified luxuries and contract settlements of top politicians to wrongdoing in public biddings or voting coercion done by civil servants; not to mention tapes of police torture or the destruction of archaeological heritage in the construction of shopping centres and parks. Besides, the information sent to Méxicoleaks fell into two scenarios:

in some cases what the whistleblower explained in the whisper – we call them whispers [*soplos*] – couldn't be proved through the documents. In other cases the documents were good, but the whistleblowers waited only a few days before sending them to other media outlets. So at the beginning it was a total disappointment. Between 88-90% of the cases – I mean, that stage is over now – but the leaks were useless, the most they amounted to was tip-offs. Sometimes they didn't leak documents, they were mainly complaints "look, here in the neighbourhood, honest –" or they'd send a picture, "they're selling drugs, you should investigate". The Mexican Snowden that we're waiting for hasn't appeared yet, but there has been some interesting stuff.⁵⁴

For these reasons, for reporters working in Méxicoleaks communicating securely with the whistleblower was crucial for managing the sense of urgency and trying to come to an agreement with the source, which amounted to "hold on, we need to verify the document's authenticity and the plausibility of the information, and that takes time". This collective activity was crucial to reducing the reporters' learning curve for new subjects and to making sense of the documents, for "in general, the most successful long-term stories were the ones where we told them through a more direct channel of communication 'hey, hang on' or 'you know what, if you have more information regarding this, send it to us' or 'could you clarify in this document?'"⁵⁵ In contrast in the Panama Papers, after an anonymous source (later known as John Doe) leaked the data to *Süddeutsche Zeitung*, there was no more contact with the source, nor the sense of urgency due to the possibility of the data being sent to other media outlets outside the ICIJ's network. Thus, time as a resource was scarce for journalists involved in both projects, but it had different implications for their activities. Méxicoleaks investigations were generally shorter – varying from three days to four months – and had to deal with the race against the clock of political timing and the whistleblower's impatience. For the reporters involved in the Panama Papers one year was simultaneously not enough time to deal with such a gigantic amount of data, yet still a long-term planning challenge. Even a month before the global publication, reporters were still mining the database and some of them had to ask their bosses for more time and extra hands in their newsrooms. One reporter told me, "we went to see the director and we told him 'look, if we don't focus completely on this we're going to lose it because it really is too much'. We already had a bunch of downloaded documents,

⁵⁴ Interview 25th October 2017.

⁵⁵ Interview 23rd February 2018.

but we hadn't done the analysis and reporting. So I kept on investigating and reporting at night, after my regular workload. Yeah, man, it was chaotic, I barely slept.”⁵⁶

Finally, both projects had different resources regarding the public attention and dissemination of their journalistic production. As I mentioned before, Méxicoleaks got an initial boost of visibility with the scandal involving Aristegui's firing, but in the long run, in order to keep running its media partners needed to position and advertise the platform itself as a reliable way of leaking information. In contrast, the Panama Papers constituted a one-off chance, invisible until its publication, which relied on the credibility that John Doe attributed to *Süddeutsche Zeitung* and the ICIJ. In terms of dissemination, the Panama Papers were instantly a global trending topic and as an international project it was included in the Mexican media agenda, but on a national level the stories on Mexico did not have the same effect, and they were addressed tangentially by the Mexican mainstream media. Some media competitors minimised the journalistic merit of the Mexican reporters involved in the project or chose to quote only international members. Despite not having similar dissemination resources, Méxicoleaks has used joint publications and credit phrasing as strategies to mobilise and make the most of their means to bring news to life in the public debate. As one of its reporters said, “Yeah, well, we're small outlets, but between the lot of us we generate good traffic”.

4.3.3 CONVENTIONS TO SOLVE PRACTICAL PROBLEMS

Let's go back to March 2015. Méxicoleaks is at its peak of visibility. Aristegui's radio programme has been taken off the air. Dozens of encrypted leaks are received every day. Reporters are overwhelmed by the amount of time it takes to download (via TOR)⁵⁷ and assess each leak on its own. All the hypothetical scenarios that in previous months were collectively discussed and crystallised in general written rules (editorial sovereignty of each media partner, source protection, and rigorous verification as conditions of publication) are proving insufficient to face the unpredictable practical challenges of weeding out information. Four stories based on promising leaks have turned out, after weeks of work, to be fake or unfeasible. Expectations grow higher and whistleblowers keep writing in because a couple of months go by and there are still no publications. It is in this context of urgency and trial and error that the Méxicoleaks reporters had to come up with a way of doing things more efficiently, perhaps collectively.

⁵⁶ Interview, 1st November 2017.

⁵⁷ The Onion Router, a digital security tool designed to allow users to access the Internet anonymously, which makes navigation slower.

To be sure, collaboration was not on everybody’s mind at the beginning. In fact, FPU’s model of non-exclusivity and sharing must not be interpreted as collaborative per se; on the contrary, the Dutch NGO’s original idea was that fierce competition between journalists would fuel and bring out the best in each media partner. As one Méxicoleaks reporter recalled, in the early stages of the project “the approach was to leave a large degree of flexibility, let everyone know if you wanted to publish a story or not, and agree on the dates, but at the time we didn’t think of it as the collaborative piece of work that it became later on. We thought that *occasionally* we were going to collaborate and the rest of the time it’d be each to their own”.⁵⁸ Moreover, there was a technical feature to the encrypted inbox that enabled the whistleblower to send the information to one or several media outlets (a screenshot of the platform is shown in Figure 4.5),⁵⁹ which in practice implied a potential scenario of one media outlet receiving an exclusive leak to which no one else had access. Consequently, in their eyes, if some of the media outlets had more visibility to the public than others and expected to be the single recipients of a great revelation, in the first boot-camps and early stages it made sense for some to continue with competition and not collaborate fully, to keep that potential advantage.

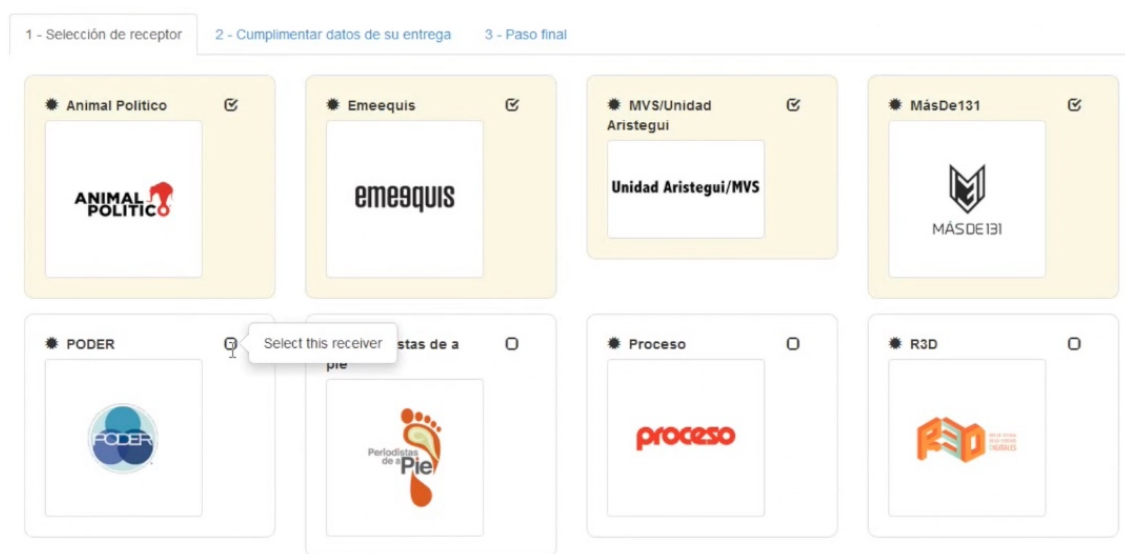


Figure 4.5: Media options displayed on the Méxicoleaks encrypted platform

⁵⁸ Interview 23rd February 2018.

⁵⁹ This logic of “the more journalists involved the merrier” resembles the initial reaction of people exterior to and unaware of the ways of doing things within the journalistic world – as was the case in my own experience of learning the lone-wolf ways in the section on competition described above.

But conditions changed and readjustments followed in their agreed ways of working. Facing these new pressures, some of the reporters began to question the sense of duplicating tasks in the name of competition and self-interest: “so then it was, ‘why are we all doing the same work on whispers that everyone is receiving?’ ‘Why are six of us working away, repeating the work that one person could do for everyone?’”⁶⁰

The solution was an arrangement in which every media partner had to communicate with others and could choose their level of involvement in temporary alliances, according to circumstances and their editorial position:

if [the whisper] is received by more than one member, ask those who received it if they are interested in the subject. From then on, a team can be created to carry out the investigation collectively; or, on the contrary, each member can investigate the whisper separately. Whichever member of the alliance announces their interest in a whisper has the right to determine the publication date. Thus, this is a flexible mechanism that allows members to opt either for cooperation or for competition. (Campa 2016)

This convention reduced the duplicate work of weeding out leaks and encouraged members to constantly check the platform for input and look for stories aligned with their interests so they could be the first to propose a case and have the lead in that particular project (*llevar mano*). Little by little, collaboration began to prove useful and even sometimes more effective than the lone-wolf ways. An example of how collaborative conventions began to be interiorised is the third piece published by Méxicoleaks on 29th September 2015. The leak pointed to peddling of influence in local government, in which the former Interior Secretary of the state of Puebla and the governor’s then brother-in-law allegedly used two peasant women as fronts (*prestanombres*) to create a company, which in turn received millions in public contracts. Three media partners received that leak: *Aristegui Noticias*, *Animal Político*, and *Proceso*. The former decided to work by itself, and the latter two chose to collaborate. Under the new agreements, something unprecedented happened: reporters from *Animal* and *Proceso* worked together and, most importantly, mobilised their respective correspondents in the state of Puebla, who gave them access to on-the-ground reporting and vital local political knowledge for contextualisation. It is important, too, to note that this was a valuable resource that *Aristegui Noticias* did not have at the time. Documents were therefore sent to both correspondents, who did the reporting together and shared the core data input, but, following the principle of editorial sovereignty, each one did the writing and editing of the piece separately. The result was a solid piece that was successfully and jointly published on the agreed date – which, incidentally, was rescheduled with *Proceso*’s approval to a couple of days later, due to *Animal*’s request for final touches and fact checking. *Aristegui Noticias*, on the other hand, did not meet the agreed deadline and could not publish the story.

⁶⁰ Idem.

In sum, under these new conventions, working together proved to be the easiest thing. For over a year, Méxicoleaks media partners went through a process of developing, learning, and readjusting their modes of cooperation, until they become “deeply ingrained” and “semi-automatic” for the majority of its members, since, as Becker points out, changes in journalistic conventions only work “if enough others join them to support the new activity” (1982:309). Take, for example, the account of one reporter from *Animal Político*:

in the group we understood very well what it meant to work as a team – later we had to *deal with our own media outlets*, but at that moment the deal was to share everything and finish the work as a group... So I think that’s been very important, I mean establishing the rules of the game wasn’t easy, but since we got through that, the rest of the work has been *smooth*.⁶¹

And the impressions of a *Proceso* reporter,

this agreement and these rules have become richer over time. I mean, we’ve made a lot of changes to the document, but it’s been a year and a half, two years since we even touched a comma. At the end of the day it’s a very flexible document, very, very flexible. Basically it’s everyone does as they please, there are basic rules and really the whole thing developed as we went along, also based on those *friendships*.⁶²

Before getting into describing how those friendships among reporters were built and how they became crucial for dealing with conflict and mediating among their respective bosses – “*lidiar con nuestros medios*” – let me illustrate with a few more examples the degree of collaboration achieved between these reporters. Ten months after its launch (19th January 2016), Méxicoleaks published for the first time a special assignment in which five of its media partners worked together.⁶³ In a nutshell, the story was about a businessman, a public notary and three civil servants who colluded to win a \$4 million USD rigged public bid to provide a cybersecurity system to the department of Federal Roads and Bridges (CAPUFE in Spanish). In terms of reporting, this case is interesting because initially the leak was only sent to one media outlet, *Animal Político*, which, instead of keeping the scoop to itself, decided to share it with the rest of the Méxicoleaks members. According to the reporter from *Animal Político*, the anonymous source was afraid of potential retaliation, so “I mentioned it to [the director], and I suggested we work on it together with the rest of Méxicoleaks because it was worth making more noise, also to protect the source. The more media outlets that came out with it, the more likely we’d manage to make some noise about the topic”.⁶⁴ This resulted in a temporary alliance in which a real division of labour occurred. It is noteworthy that the reporter for *Aristegui Noticias* dealt with the governmental contact, while the reporter for *Animal Político* got a crucial interview with the businessman involved, which was shared and appeared in all five

⁶¹ Interview 9th February 2018 (my italics).

⁶² Interview 23rd February 2018 (my italics).

⁶³ *Animal Político*, *Proceso*, *Aristegui Noticias*, *Periodistas de a Pie*, and *Poder*.

⁶⁴ Interview 14th August 2018.

versions of the news story. A similar mode of organisation took place a couple of months later (8th March 2016) with the *especial* on the destruction of archaeological heritage in the building of a shopping centre in Valle de Bravo, in Estado de México. Even though the initial leak consisted more of a civic complaint (*una pequeña sospecha*) than of privileged documents, by then the collaboration was interiorised enough that six of the media partners got on board,⁶⁵ formed an alliance and designed a road map, which produced Méxicoleaks' longest (four months) and most in-depth assignment so far. Contrary to the first *especiales* published the year before, the common pooled resources mobilised for the Valle de Bravo story were notable: freedom-of-information act requests; searches on the public property registry; trips to the site; video-recording using a drone;⁶⁶ as well as archival work at the National Institute of Anthropology and History (INAH), of whose existence no one in the team was aware, until one reporter heard of it while interviewing experts on the matter. Furthermore, working in packs proved effective for reducing the reporters' learning and verification curve, since, as one of them recalled, "none of us knew anything about that topic, no one had covered anything about culture and we had no idea whether what the leak said was real".⁶⁷ At that stage of the Méxicoleaks platform, the alliances brought together various skills and enriched the deliberative process:

we are all very obsessive about checking everything, so everybody plays devil's advocate in those meetings... If someone says "ah, this is all we need to confirm such-and-such", another one says "no, wait there's still this other way of getting such-and-such" or each of us knows different tools... so the fact that we come from different media outlets is helpful because each of us brings different skills that we've developed in our own media outlet. The only thing we do is bring them together. And it works very well.⁶⁸

Meanwhile, the relationships created within the team enabled the reporters to "share the excitement" and their satisfaction while working. Notice the good memories shared by two reporters involved in the INAH case:

R1. At one point we ended up superposing maps.

R2. Oh, that's right! [*smiles*]

R1. Do you remember that?! [*smiles back*] It was very interesting, we were superposing them with Google, with maps from the INAH and we didn't understand much about the properties. "Oh shit, what are those?" So we had to go back [to the site], and use a drone, and so it *was* hard work, but it *was cool hard work*... I mean, it was a lot of work. We read a tonne of documents. We checked thousands of papers... When I look at a piece like that one, I think "it was worth it, those four months of work". It gives me great satisfaction.⁶⁹

⁶⁵ *Animal Político*, *Proceso*, *Aristegui Noticias*, *Periodistas de a Pie*, *Más de 131* and *Poder*.

⁶⁶ For instance, this resource and expertise was a major contribution from Más de 131's audiovisual team.

⁶⁷ Interview 9th February 2018.

⁶⁸ *Idem*.

⁶⁹ Interview 23rd February 2018 (my italics).

Moreover, the Méxicoleaks reporters started to develop a long-standing friendship and cohort collegiality, in which a key element was regular face-to-face meetings to coordinate the work of the temporary alliances: “there was great chemistry [...] and] that went beyond the media outlets, ’cause there formed a little Méxicoleaks group, and in fact some of them tease us about it, but that laid the foundation for what later became [the collaboration]”.⁷⁰

These relationships of trust based on friendship proved very important for managing the micro-politics in and outside of the alliances in cases of conflict or transgressions – from which collaborative works were not exempt. The next examples illustrate the types of tension that the reporters had to negotiate between their bosses and fellow Méxicoleaks colleagues. In the first publication (24th May 2016), there was a strong complaint from one of the media partners because an online teaser was published before the agreed time for the joint release, due to a confusion in the inner distribution protocols of the media outlet involved. On another occasion, one of the reporters unexpectedly called the rest to tell them that due to a force majeure regarding the anonymous source, his media outlet was going to release the news in a couple of hours and not in a couple of days, as originally agreed. As was to be expected, with such short notice the rest of the reporters could not come up with news of their own in time and lost the scoop, to the annoyance of one media director, who reprimand his reporter and threatened to leave the alliance for good. Finally, there was the problem of fulfilling the tasks and reporting goals in time for the alliance’s fortnightly meetings, since in parallel to Méxicoleaks all the reporters had to cover their own media outlets’ workloads. To find a solution to these problems, this band of reporters created a space of negotiation in which all frictions were discussed openly in meetings. In fact they assumed the role of brokers, that is to say, actors with enough closeness “to mediate between otherwise unconnected parts of the network” (Bottero and Crossley 2011:112). Consider this account of a reporter from *Aristegui Noticias*:

we got along pretty well. If my boss had told me to take a certain position, say, for my media outlet, I’d tell the other “this is my position, because it’s the position of my media outlet” and we could discuss it... but in the end it worked out well because they knew it wasn’t necessarily my position... we know that in the meetings we’re there as *representatives*; we’re the ones who write the pieces, the ones that perform the investigations, but at the end of the day what we publish does depend on something bigger, which is our media outlet’s editorial position. We always talk about it openly, the fact that what works for our media outlet has to be reconciled with all the rest.⁷¹

And the following view of a reporter from *Proceso*:

in the meetings we put forward our directing teams’ positions, but *in a more conciliatory tone*. It wasn’t [my director] dealing with [your boss], it was [a colleague] talking to [another reporter], and that changes

⁷⁰ Idem.

⁷¹ Interview 9th March 2018 (my italics).

everything, 'cause you say "well, that's my line from upstairs, let me put it to you this way", but always with a back-and-forth among everybody.⁷²

Therefore, the Méxicoleaks reporters created a climate for dialogue, in which they could present the position of their media outlet with a certain amount of detachment from their personal point of view, which in turn enabled them to listen to what the others had to say, reconcile their views, and reach a common solution. The resulting compromise would later be pitched to each respective boss in an attempt to intercede in and mediate the tensions. In the three examples of friction mentioned above, the agreed solutions for future stories consisted in not publishing teasers or releasing news unexpectedly and unilaterally, as well as a system of prior warning for reporters who did not deliver the work on the agreed day, which could lead to them being dismissed from the temporary alliance, thus encouraging the sustained participation and effort of all members while investigating a story.

Six months after Méxicoleaks was launched, reporters from all over the world flew to Munich to attend a training camp hosted by the ICIJ, in which reporters were taught how to use the ICIJ's tailored tech-tools and, most importantly, introduced to the rules of the project. In a nutshell, as we mentioned above, the agreement consisted in securing the data through encryption and a rigorous policy of secrecy-keeping from people outside the ICIJ network – but reporters were also bound to keep the publishing embargo; share their publishing calendar; and share their findings by uploading everything onto the I-Hub communication platform. In practice, the two last rules were observed with varying degrees of compliance: not everyone remembered to upload all their findings, and some of the shared publishing calendars were so coy and general that it was difficult to know who had which stories. As one of the Mexican reporters involved recalled, "so, yeah, it was about sharing, but grudgingly, like, 'hey, what have you found on this?' 'Gosh, ok, I'll send you what I've got', but it wasn't as fluid as it should've been, say, if someone found something and [said] 'hey, I've found something amazing here, I'm sending it on to you', like it could've been on other occasions."⁷³ In fact, I was able to observe first-hand a similar kind of reluctance during the last weeks of the new ICIJ project, the Paradise Papers (see Chapter 5).

Nevertheless, there were interesting instances of cooperative activities, mainly in the early stages of the project, when for around six months the reporters' common goal was to mine the gigantic database simply to identify and make sense of potential stories. Additionally, the Mexican reporters got in touch with Dutch and Uruguayan journalists to exchange documents and some contextual information to clarify, respectively, the relation between Mexican pharmaceutical

⁷² Interview 23rd February 2018 (my italics).

⁷³ Interview 1st November 2018.

companies and offshore structures in the Netherlands, and between Mexican drug cartels and a Uruguayan firm.

The difference in the degree of collaboration between Panama Papers and Méxicoleaks has various explanations. First, both projects were triggered by external models introduced by actors outside the Mexican journalistic world, which mobilised collaborative and tech-for-good discourses; however, in practice they both functioned under different logics and conditions. On the one hand, FPU was originally keen on competition but also had a more laissez-faire approach, which gave Méxicoleaks reporters the freedom to negotiate and readjust their conventions. In contrast, the Panama Papers were coordinated centrally by the ICIJ, which established the working norms from Washington, thus leaving little room for the reporters to adapt and modify the rules of collaboration.

Second, the condition of strict secrecy and the distance – even linguistically – between the members of the ICIJ network meant that in practice the two Mexican media outlets, *Aristegui Noticias* and *Proceso*, could not mobilise certain resources available to them from other existent networks, and could not obtain sustained and significant support from unknown foreign partners. For instance, faced with work overload and the urgency of the last month before the publishing date, *Proceso* decided to readjust the ICIJ’s secrecy rule, and thematically divided the stories among desk reporters from its newsroom’s inner circle, so that the news could be efficiently reported and ready on time.

Third, the constant trial-and-error based learning process and the face-to-face relationships that took place during Méxicoleaks meetings and publications were less intense for the Panama Papers case. Partly because after the global publication date and follow-up stories, the Panama Papers project, by definition, was not meant to keep running as a long-term platform. The one-off publishing opportunity of the Panama Papers resulted in a similar competitive dynamic to the very early stages of Méxicoleaks, where non-exclusivity and publishing embargos did not necessarily by themselves trigger robust collaboration, such as temporary reporting alliances. Instead, “there was some tension because of the scoop, of course, and about who was going to be identified most with the Panama Papers...[a certain] ‘why do *they* have that story but we don’t’”.⁷⁴

Like Méxicoleaks’ initial practical troubles, the Panama Papers reporters faced a duplication of work, which, when dealing with sources involved in potential wrongdoing, had the risk of alerting and closing valuable sources of information. For instance, reporters from *Aristegui* and

⁷⁴ Idem.

Proceso separately interviewed the same Mexican offshore lawyer who had a connection with Mossack Fonseca:

so the thing was, why, why should we double the work? Besides, it makes a lot of noise, you know? “Why are you and [the reporters from the other media outlet] asking me the exact same questions?” Well of course, we had the same documents... That is a bit of a shame, because in the end we wasted a lot of time doing the same thing, when we could’ve distributed [the work] a lot better. I reckon it was all because of the old [*snaps fingers as if to say, “quick!”*] “we have to publish more stories than [them]”.⁷⁵

In contrast, take for example the joint special assignment that seven of Méxicoleaks’ media partners published later that year (25th September 2016) about how the PRI’s national party leader misappropriated a settlement for 1.2 million pesos after he resigned from his position at the Federal Electricity Commission. In this case, the crucial video interview with the top politician was not duplicated but coordinated and executed by reporters from *Proceso* and *Animal Político*, and later shared with all members of the alliance. The story was a hit.

Moreover, competition within the Panama Papers network sometimes produced miscommunications and uncertainty about not knowing what stories, and in what level of detail the others had elaborated their news, thus resulting in scoops being rushed and their impact lessened (*quemar la nota*), a situation which took place again in 2017 during my newsroom observations on the Paradise Papers:

I remember a case [...] that I’d worked on, but it was missing the key, the element that could explain it all and I needed that. And [the ones from the other media outlet] announced, “hey we’re gonna bring this out on Wednesday”. And so by Tuesday evening I’d searched and searched and searched and hadn’t found that key element. I said “I’m sure [the other media outlet] has it and, well, it’s OK for them to publish it, isn’t it?” And the next day when I read their news, I was like “Those bastards, they’ve got nothing!” I was really pissed off. And we published our piece as well, but it was because of that lack of communication.⁷⁶

Likewise, the difference with Méxicoleaks is striking if we consider the coordination of reporting behind one story (2nd June 2017) about how civil health servants from Ecatepec in Estado de México used cell phone chats and online password-protected databases (including names, addresses, phone numbers, and even recruitment data displayed on maps) to operate a network that illegally gave citizens precharged payment cards in exchange for votes for the PRI. As with the previous Panama Papers anecdote, time was precious, since the leak arrived only four days before the gubernatorial elections were to take place. As soon as the leak arrived, the reporters from *Aristegui Noticias*, *Animal Político*, and *Proceso*,

divided up the tasks [*snaps fingers*], but everything at max speed, you know, text messages like tac, tac, tac. And in three days we had three pretty solid texts, and it was fucking great work. It was a matter of checking the [Ecatepec electoral] platform and then making simultaneous calls to the physicians, we agreed together

⁷⁵ Interview 23rd February 2018.

⁷⁶ Interview 1st November 2017.

to call at exactly ten in the evening, “you call such-and-such, you call so-and-so”, and you do the maximum of calls without giving them time to warn the others, to spread the word.⁷⁷

In both projects, reporters performed various cooperative activities and communicated constantly to clarify dates, key terms, and notify the others about decisions being taken in their own media outlet. Nevertheless, by now I hope it is clear how the hard-won interactional process the Méxicoleaks reporters went through made a difference in transcending the initial practical troubles and creating agreed ways of: 1) sharing and mobilising available resources; 2) establishing a real division of labour; and 3) creating and negotiating an adequate and interdependent organisational system which enabled them to articulate their findings into more robust stories.

In this chapter I purposefully selected the case studies of two iconic collaborative special assignments for the Mexican context, which from the outside might seem to share the enthusiasm for collaborative radical sharing and challenge the “lone wolf” professional ideal subject. The discourses of both the Panama Papers and Méxicoleaks have been praised for their non-exclusivity agreements, which were a requirement for accessing whistleblowing datasets and platforms. Nevertheless, what my ethnographic data and interactionist network analysis shows is that the differences in the degree of collaboration between both projects were not a matter of individual professionalism nor extraordinary altruism or conviction in the radical sharing discourse; rather, they responded to the extent to which collective agreements, pacts, and trust were established and fulfilled reciprocally. Of course, these social relations and arrangements were not in place at the start of both projects but the result of trial and error, negotiated consensus, and going to the trouble of doing things unconventionally. For instance, as one of the journalists who participated in both projects told me when I asked why (in the case of a Méxicoleaks piece) he did not share any additional context with a U.S. fixer who was asked to verify the whereabouts of a person across the border, he answered with an air of stating the obvious: “because I don’t know him, and you never know what relations... but yeah, you’re right, that doesn’t sound very collaborative of me”.⁷⁸ I argue that responses like this one make sense because they point precisely to the gap between practice and discourse, and show the limitations of radical sharing as an arrival of new collaborative era, because without the network arrangements necessary to secure and sustain cooperation, even iconic transnational collaborative projects can end up reproducing professional competition and getting in the way of collegiality, trust, and reciprocity. Moreover, both case studies shed light on the interplay of professional discourses and their political economy in the way that these projects were initiated and organised by international consortia or non-profits funded by international aid

⁷⁷ Interview 23rd February 2018.

⁷⁸ Fieldnotes 22nd August 2018.

and donors external to the Mexican context. Contrary to the radical sharing discourse of a horizontal, non-hierarchical, fluid, evolving, and truly global collaboration, what my empirical data shows is that the more the power to define topical priorities, cooperation rules, and sanctions, grant access to data, and develop technology, was centralised, rigid, and imposed from above (“take it or leave it!”), the more cooperation was lukewarm and failed to network the expertise of its members, or – as we will see in the next chapter – to develop “the ability to sum up the results of multiple [...] experiments [...] to make [their] claim for the efficacy of [its diagnosis and concepts] stronger” (Eyal 2013:864,886).

5. NETWORKING EXPERTISE: COOPERATION WITH OUTSIDERS

In Chapter 4, I focused on how different degrees of competition and cooperation were negotiated among editors and reporters from different media outlets working on the same special assignments. In this chapter, I would like to explore the situations and cooperative interactions between reporters working on special assignments and other kinds of professional competitors or “outsiders”: non-journalistic actors such as civil servants, information designers, and think-tank advisers. I study the collaboration built around *La Estafa Maestra* (the Master Scam), whose reporting methodology on shell or “ghost” companies was able to connect the work and “transcription devices” of different audit experts from occupations outside journalism. The chapter opens with theoretical considerations regarding the jurisdictional reading of the professional norms and conventions to mobilise “expert” sources, under which journalists regard outsiders merely as part of an attributional strategy to transfer responsibility and cover their backs against external criticism. I offer an introduction to the case and explain how even though the *Estafa* reporters had time, autonomy, and resources, in practice they faced conceptual challenges, which pushed them to do things unconventionally. The analysis of my ethnographic data draws on Gil Eyal’s sociology of expertise and expands upon Becker’s network analysis.

By focusing on the social relations, arrangements, and materiality that are needed to secure “a circuit of dialogue and exchange” and “chains of transcription” among the different nodes and actors in this audit network, I show that going to the trouble of establishing hard-earned relations of trust with these professional “outsiders” not only enabled reporters to minimise the inherent risks of everyday news-making, but more interestingly it allowed them to work under a more reflexive calibration of risk, and therefore take greater risks for the sake of their story. Moreover, I show that while in the first instance the *Estafa* reporters mobilised a “collaborative” discourse based on altruism to try to foster the cooperation of outsiders, without much effect, it was only later – after building trust by linking their work and “transcription devices” – that they were able to secure the cooperation of audit experts and literally resurrect *La Estafa* as news. I conclude by arguing that the resurrection and resilience of *La Estafa* as news and its power to intervene in the public debate relied “not [on professional] restriction and exclusion, but [on] extension and linking” (Eyal 2013:876), which shows – in the rupture with professional norms of individual autonomy, territoriality, and competition – a counterintuitive “winning by losing” scenario. I make the case that to fully understand whether this nascent network of audit expertise can endure or even be consolidated into a long-lasting collaboration, our line of enquiry must pay special attention to how every link in the chain of transcription is assembled, maintained, and positioned. Put differently, a

sociology of expertise requires “investigating how long these different chains of transcriptions are; whether they can be traced backward or not; what qualities are added and subtracted along the way; how secure are the links, the transcriptions [and] what other actors, devices, and arrangements were involved in constructing each link; and how their cooperation is secured” (Eyal 2013:874, 876).

5.1 CONVENTIONS FOR MOBILISING “EXPERT” SOURCES

In the 1970s, sociologist Gaye Tuchman described how reporters and editors used quotations and other citing devices as “strategic rituals” to “minimize the risks imposed by deadlines, libel suits and superiors’ reprimands” and to protect themselves by attempting to legitimise their work as mere “factual” reporting on “statements belonging to someone other than the reporter” (Tuchman 1972:662,668). Another common practice for mobilising sources is the so-called “he said, she said” style of reporting (Friedhoff 2012; Rosen 2009, 2011) which, as Thomas E. Patterson has pointed out, allows the journalist to safely and actively seek out adversarial statements so they “don’t have to wait for conflict to erupt; instead] fights can be arranged by soliciting opposing views and playing them against each other” (2013:37). At the same time, presenting “both sides of the story” enables the journalists to claim “balance” and “fairness”, even though “the side-by-side placement of statements of differing factual integrity” (ibid.:52) can create false equivalences and leave the audience to deal with extreme relativism.

This critique, emphasised within the trade and by scholars of sociology of news and journalism studies, has a dual function. On the one hand, it addresses the problematic character of the claim that “facts speak for themselves” and makes explicit the rhetorical devices and social positioning upon which the epistemic and political legitimacy of people considered “experts” is based (Carlson and Lewis 2015; Gieryn 1983; Schudson 2006). Secondly, in doing so, it includes news and newsmakers in a wider intellectual discussion on truth-seeking and the construction of knowledge (encompassing sociology itself and science as a whole), which has been growing in importance from the 1960s onward, fostered by several disciplines, from philosophy of science to sociology of knowledge, not to mention science and technology studies (Baert 2005, 2009).

On the other hand – and more importantly for the argument of this chapter – the research attention given to how journalists mobilise expert sources sheds light on the practical problems and day-to-day conditions under which these interactions occur. For instance, Tuchman describes how, “unless a reporter has drawn an extended investigatory assignment, he generally has less than one working day to familiarize himself with a story’s background, to gather information, and to write his assignment [... leaving] no time for reflexive epistemological examination” (1972:662). According to Albæk, “when the deadline for breaking a piece of news is almost coincident with the event itself, there is little time for independent research”, so that consultations with “experts” provide the reporter with a “quick fix” of context and interpretation (2011:338).

In addition to time constraints, managing risk is crucial. As in other professions, making mistakes can incur reprimands from the bosses, which can lead to being passed over for promotion or ultimately losing one's job. However, for journalists, depending on the country and local sociopolitical dynamics, each published story has to take into consideration the uncertainty regarding a myriad of factors and reactions from third parties which are difficult to foresee: from the common user asking for corrections, to corporations with vast resources "rolling out the lawyers, the public relations specialists, the 'crisis management' commandos" (Okrent 2006:69); from rare but financially disastrous libel suits, to lethal anti-press violence – especially at the subnational level, in the Mexican context (Brambila 2017; Waisbord 2002). In other words, journalists deal with complex "risk assemblages", which are relational, contingent and "dynamic combinations of actors, technologies, contexts, resources, and risk perceptions" with different implications for their practices (McPherson 2018:211).

Overall, the general picture described by the academic literature is one of a double precarity in the interactions between journalists and "expert" sources. On the one hand, the more pressing the time constraints and the workload, the more their exchange is *precarious* – as in the original Latin, meaning "obtained by entreaty" – for it is reduced to obtaining "punchy witticisms", a "quick fix", not only resembling more of a mercantile transaction, but also implying a highly asymmetrical relationship of a "sacerdotal orientation" (Blumler and Gurevitch 1995:89). On the other, the higher the stakes of the story and the more disastrous its potential consequences, the greater the need to reduce uncertainty, which, depending on the time and resources available, can be achieved by a repertoire of different strategies.

Consequently, my argument for this chapter is that an important lesson for every experienced newsmaker (from those doing daily news to news columns and special assignments, etc.) is to find effective ways of undertaking "defensive work": anticipating one's critics and vulnerabilities in the light of changing circumstances involving different degrees of risk and uncertainty, as well as scarce resources. This is not to argue that risk and resources – time, funding, knowledge, autonomy, authority, etc. – are equally distributed among newsmakers working in different types of news production, but rather that all of them share a relatively standardised and ingrained understanding of ways to protect their work and the people involved in it from the "multiplied and omnipresent" dangers of publishing news. Thus, within the journalistic world this repertoire of defensive work makes sense – in fact, it is a vital part of all reporting, and indeed any kind of (self)editing work – becoming the reasonable thing to do, depending on how precarious the journalists' settings and relations are.

At one pole of the defensive spectrum we have the low costs, ease, and safety of getting a few "expert" quotes to cover one's back or mask one's views. In the words of journalists I spoke

to in Mexico who were very critical of this practice: “if you don’t understand it, put it in inverted commas” (*si no lo entiendes, entrecomíllalo*). An instance of this precarious scenario and conventions can be found at the heart of Western liberal media. In the piece “In Pursuit of the Clever Quotemaster”, published by the *New York Times* in 1989, the author illustrated how handy and frequent it was for reporters to call upon the same “knowledgeable phrasemakers” from all sorts of institutes, centres, foundations, and universities in Washington DC, who were “adept at producing punchy witticisms” on all kinds of topics – from fiscal policy and budgeting to the Middle East and disarmament. In newsroom slang, some of these experts were crowned “kings of quotes”, for logging, in one year, more than a thousand phone calls from almost two hundred news organisations in 17 countries. When interviewed about this practice, the then head of the *Los Angeles Times* Washington DC bureau said:

[Interviewee:] when you are going to make an opinionated kind of statement, particularly in the news columns, editors insist you attribute it to someone other than yourself – *so you go shopping*.

[Interviewer:] For someone who reflects your point of view? [Interviewee:] It happens. (Gamarekian 1989, my italics)

Note the casual way in which the head of the Washington bureau concedes “it happens”, when talking about going shopping for quotes. I argue that his answer has a sense of normality precisely because, for such a well-socialised professional and experienced journalist, these practices made sense under certain real-life circumstances, and in fact constitute a convention, a shared understanding of his journalistic world, to such a degree that he decided to admit it naturally, on-the-record, knowing he was being interviewed for an article on “quotemasters” at the *New York Times*. It is not ideal, but it works.

Yet, this does not mean that a blunt tool such as “covering your back” with quick quotes is the only possible way that journalists can mobilise expert sources. In fact, as we will see in the sections below, in some cases going to the trouble of establishing relations of trust with “experts” not only enables reporters to minimise the inherent risks of everyday news-making, but more interestingly it actually allows them to assume and take greater risks for the sake of their story. This is the opposite pole of the defensive work spectrum: finding more complex and challenging ways to “*amarrar la nota*”, as the journalists I interviewed designated the practice of making one’s piece watertight.

If this is the case, following the lead of my research subjects, whose assignments were produced under “special” conditions (hence their label, *especiales*), I aim to shed light on what it takes for journalists to do things unconventionally, to change their practices, and how far this enables them to have less *precarious* relationships with expert sources and, in fact, assemble and strengthen a cooperative network of expertise. My approach relies on the understanding that conventions are rarely immutable and, on the contrary, have a certain flexibility, inasmuch as they

are learnt in practice and shaped through the interactions of people involved in a particular journalistic work. In the words of Howard Becker:

conventions make collective activity simpler and less costly in time, energy and other resources; but they do not make unconventional work impossible, only more costly and difficult. Change can and does occur whenever someone devises a way to gather the greater resources required or *reconceptualizes the work*, so it does not require what is not available. (1982:35)⁷⁹

Furthermore, I argue that looking closely at the production of special assignments is relevant not only to understand the minority of journalists who work in this “luxurious” investigative suburb, but rather it can help us reexamine how and under what circumstances conventional practices and cultures are maintained or might change at the centre of the journalistic world. This is especially so in times where claims of new eras and radical change in the trade seem to be ubiquitous in discourses on the future of journalism and its professional crisis, but are rarely empirically qualified. In reality, changes in the journalistic worlds I analyse are messier and more nuanced, for it takes more than sheer willpower or awareness for journalists to alter their practices. Hence, the sociological pertinence of the following case study – the special assignment known as “La Estafa Maestra: graduados en desaparecer dinero público” (“The Master Scam: Graduates in Disappearing Public Money”) by *Animal Político* and Mexicanos Contra la Corrupción y la Impunidad (MCCI) – is to make the strange familiar and the familiar strange in a manner similar to what Clifford Geertz suggested was the use of studying common sense as a cultural system: “providing out-of-the-way cases, it sets nearby ones in an altered context” (1983:77).

5.2 LA ESTAFA MAESTRA: THE UNCONVENTIONAL TROUBLE OF UNDERSTANDING

In Mexico, every February journalists routinely wait for the annual report of the Federal Superior Audit Office (ASF in Spanish) to be published and presented in Congress. This independent body’s report is in fact the result of a whole governmental audit programme, which, from its creation in 2000 to the latest reform in 2016, increased by 602% the number of individual audits, and is now authorised to investigate any branch of the national or subnational government receiving federal money. Over a period of almost 20 years, the ASF’s audits have become a seasonal thing for journalists, a ritual of the Mexican political system that cannot be missed in the news agenda. Like the approval of the federal budget each December or the President’s Address to Congress in September (colloquially known in some circles as “President’s week”, *la semana del presidente*), the ASF’s report is regularly typified by journalists as what Tuchman calls “continuing news”, that is to say “a series of stories on the same subject based upon events occurring over a period of time”,

⁷⁹ My italics.

and which are prescheduled, of urgent dissemination, and facilitate future predictions (1978:49). Most journalists know the news cycle: the audited entities have 30 days to justify and clarify all the ASF's observations, which then are revised and followed up on by the ASF four months later.

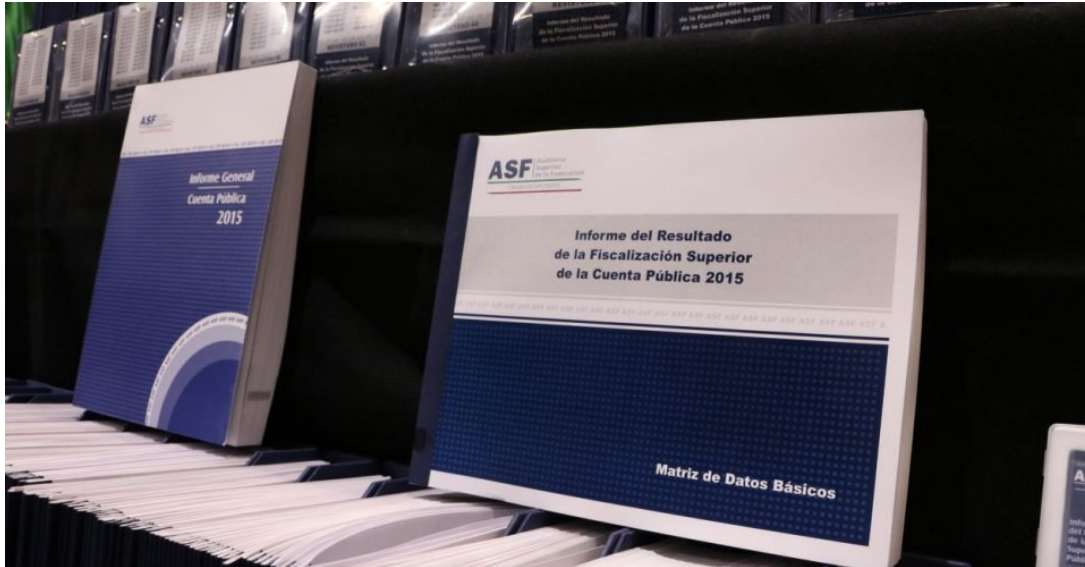


Figure 5.3: Folders containing the numerous volumes of the ASF's annual report (Source: *Animal Político*, 2017)

At the same time, inside the multiple volumes and thousands of pdf documents that form the ASF's audits, pictured in Figure 5.1, there are juicy details and information – some as brief as half a page – on the performance and spending irregularities of hundreds of government entities, which, even if they constitute just a small sample of the total auditable spending, can potentially point to leads and hints for stories. So, from the last week of February onward, one can find in the Mexican media a repertoire of “continuing news”, in which the ASF report is the main or only source. Of course, among this type of coverage, there are pieces that stand out as having been made, usually, by attentive and experienced reporters, who add pertinent context, establish connections with audits from previous years, or use data from the ASF report as a window of opportunity to rekindle topics they have been covering, in some cases for many years. In 2016, the year of the present case study, some examples of the latter can be found in media outlets like *Proceso*, *Aristegui Noticias*, *Huffpost.com.mx*, and *Newsweek en Español*, as well as in the digital-native media outlet *Animal Político*, which, the following year, in collaboration with the non-profit association Mexicanos Contra la Corrupción y la Impunidad (henceforth MCCI), would publish the multi award-winning special assignment later known as *La Estafa Maestra*. At that point, however, like every February, it was business as usual and the division of labour on the matter was gradually being allocated, for as *Animal Político*'s director explained:

in February 2016 the [ASF] report was published, and we had a meeting two months later, in April, to debrief about “what the Audit Office is telling us”. We published several pieces, but just the normal stuff, you know, the general report, specific cases, etc... So what's the ASF telling us, what work plan is the ASF giving us, right? Because – I'm telling you – since the ASF doesn't have the legal powers to do it all, it passes the ball for us to kick... so [the report says] “look, this is happening in Chiapas, that's happening in Quintana Roo, the federal government is doing such-and-such”... ah, perfect, so we started to deal the cards, reporter one, you're assigned to Chiapas, reporter two, you go with Quintana Roo. And the reporters start first with the easiest bits, we start to assign some investigations, and so on.⁸⁰

It is important to note that very rarely are special assignments conceived in the first place as full-time projects with a fixed grant or budget and publication date; instead, they tend to begin as more-or-less promising hints, as concatenated leads, which are assessed by reporters and editors at different checkpoints. As a result, the scarce time and available resources are invested cautiously, step-by-step, depending on the constant oral negotiation between reporters and editors regarding the feasibility and newsworthiness of a particular piece. As we will discuss below, it is a risky business. The worst scenario is having invested a lot of resources and effort in hints that lead to nothing, to non-news (*que no haya nota*), or an insurmountable dead end, where the key data for a story cannot be obtained.

⁸⁰ Fieldnotes, 5th September 2017.

For now, let's return to those early and tentative stages, for between that routine meeting in April 2016 and the publication of the piece in early September 2017, the journalists' ways of reporting and understanding those hints and leads were going to change drastically. A first step occurred in a meeting in late August 2016, six months after the ASF report was published, when, as *Animal's* director recounted, he decided to assign two out of the total five reporters working at *Animal Político* at the time to investigate in further detail the contracts allocated to public universities in different states of Mexico. For four years in a row, these were pointed out by ASF's special forensic audits as presenting "a pattern" of serious irregularities:

[in the meeting we said] look, there's a lot of material on universities, because the Audit Office is now saying "hey, there are 30,000 million pesos involved here, in illegal contracts". The ASF already said they're illegal, we're not going to get into that debate, because the ASF already said so, but I'm telling you, the ASF only looks at the government-university connection and takes a sample of companies. So, what do we do: use the methodology I was talking about just a moment ago.⁸¹

This is a classic example of what Tuchman has described as the "typification of news", which is "intended to facilitate news processing" and in a way resembles the triage employed by other professions such as medics to assign degrees of attention and urgency, thus creating a known order of treatment to "objectify symptoms as defined (categorized) diseases" (1978:59, 215). In this case, on the one hand, *Animal's* decision to assign further reporting work and editorial attention is partly related to the degree of credibility attributed to an official, but also constitutionally independent federal body like the ASF, which makes the latter's signalling of governmental wrongdoing a legitimate and legitimating source of information ("the ASF already said so"), credible enough to avoid "getting into that debate". Thus, the ASF's leads on public universities were worth the time and effort.

On the other hand, *Animal's* decision moved the case from a "continuing news"-type treatment to a different sort of coverage, one with no urgent publication date (at that point), or prescheduled events. Yet, it is interesting to note how emerging and unexpected leads were processed through the framework of previous experience and known triage, so that even when "other modes of coverage were invoked", "work routines can be routinely altered" (Tuchman 1978:62–63). In the excerpt above, "the methodology" refers to a series of shared knowledge and practices developed "in the making" of past investigations, which had proven effective for reporting shell companies. In particular, the natural reference and reporting framework for the editors and reporters following this new case was *Animal Político's* at-the-time biggest story, "The

⁸¹ Idem.

ghost companies of Veracruz” (“Las empresas fantasma de Veracruz”)⁸² – a high-impact *especial* published a few months earlier, in May 2016, which revealed how the administration of Javier Duarte, former governor of the state of Veracruz (currently imprisoned), used “ghost companies” to deviate public funds.

In a nutshell, editors and the *Animal* reporter assigned to the Duarte case⁸³ explained their investigation route as follows: 1) it started with tip-off from an upset businessman who had been a local government contractor in the past; 2) from the entire universe of government agencies in Veracruz, they narrowed their research down to two years; 3) once a more manageable pool of contracts was defined, they started collecting all the information available on the companies that appeared in the contracts and who owned them; 4) by creating lists and diagrams, such as the one shown in Figure 5.2, the reporters started to manually cross-reference the data on the companies and began to visualise and identify different “emerging coincidences” between companies; and 5) with all this background, they finally made carefully-planned fieldtrips to interview the companies’ partners, and verify in situ their fiscal addresses and whether the contracted goods and services actually were delivered to the people allegedly targeted by the social programmes in Veracruz.

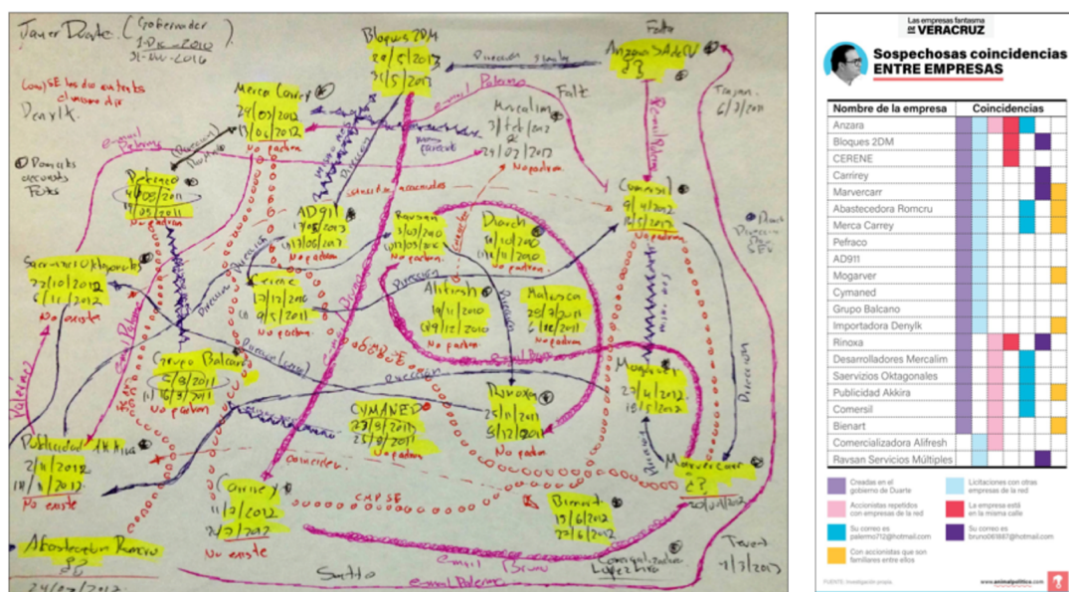


Figure 5.2: Diagram of “suspicious coincidences” between companies involved in Duarte’s case (left) and the final visualisation published in the special assignment “Las empresas fantasma de Veracruz” (right)

⁸² A state in Southeast Mexico, which has historically been the strategic commercial gateway to the Atlantic and more recently also key for the oil industry in the Gulf of Mexico.

⁸³ There was another local reporter from Veracruz involved in this case, who later decided to withdraw his byline from the final publication as a result of direct threats and aggressions.

Luckily for the reporters, the shell or “ghost companies” (as they were called in the final piece) selected by Duarte’s administration to receive public contracts were very sloppy about hiding the connection between them. For this reason, the reporters started to visualise a pattern of “suspicious coincidences”: different companies shared the same stakeholders; stakeholders from different companies were in fact relatives; several offices and fiscal addresses were actually households or corner shops located on the same street of a poor neighbourhood; some were officially registered to the Secretariat of the Economy (SE) using the same contact email; when invited to closed public biddings with three participants, the same companies simulated competition by merely rotating their winning or losing place from contract to contract; also, almost all winning companies were created during the years of Duarte’s administration. In the words of *Animal*’s director, “I’m telling you, in Veracruz it was such a rough process, and that we’ll always be thankful to Javier Duarte [*he smiles ...*] because he didn’t bother to hide all this... our advantage was their reckless ambition, that’s why all these things [the matches] kept popping up”.⁸⁴ This lack of sophistication in “counter-forensics”, understood as “efforts designed to frustrate or prevent in advance the [...] investigation of physical or digital objects [...] by seeking] actively to block the deposition or collection of traces and/or to erase or destroy them before they can be acquired as evidence” (Forensic Architecture n.d.) meant that once the reporter was able – albeit not without hard work – to detect these “emerging” coincidences, it was relatively straightforward to make the case that a credible network of corruption was in place.

So, by the time two new reporters at *Animal* were assigned to investigate the ASF’s leads on universities in September 2016, they already had a “methodology” to follow (which later on was compiled and standardised in an internal handbook), and had received some advice from their colleague. This is what they knew had worked in the past. Thus, for around four months they started a long, slow process of selecting a more manageable sample and assessing the news potential of the leads. After sifting out almost a hundred individual ASF audits on universities, the reporters began by narrowing them down – like in Duarte’s case – to a preliminary sample of around 20 federal agencies that had signed contracts with public universities involving around \$525 million USD. The next step was submitting a first round of hundreds of freedom-of-information requests to these universities and public agencies to gather the complete documentation of those covenants, as well as starting an initial online search for any available information on the companies involved. Apart from the sheer amount of public money potentially misappropriated, some of these leads also looked promising – or, in the words of one reporter, “extremely odd” (*rarísimo*) – for the

⁸⁴ Fieldnotes, 5th September 2017.

companies that were paid millions of pesos to provide specialised consulting on oil production or housing credits were in fact shoe manufacturers or had no online trace. However, at this point, the assignment still had non-urgent status and ran parallel to other daily and weekly reporting, as one reporter recounts: “for several months it remained in limbo... I remember that every week in the editorial meeting [editors] said to us, ‘how’s the universities piece going?’ – nah, we couldn’t get anywhere with it”.⁸⁵

This changed by the end of December 2016, when *Animal* found out, through common friends and colleagues, that the journalists at the non-profit MCCI were also reporting on the ASF’s leads on universities. The potentially disruptive risk of losing the scoop was mitigated thanks to the close relationships of camaraderie and trust between both chief editors, as well as precedents of alliances between both organisations: within six months of its founding, MCCI partnered with *Animal* in the last reporting stages of the Duarte case by covering the expenses for the last visits to the field. Therefore, the directors decided not to rush publication and, on the contrary, came up with a temporal alliance: one of MCCI’s reporters joined the other two from *Animal*,⁸⁶ and the latter were assigned full-time to the case; *Animal* had the lead regarding the main editorial decisions, but MCCI contributed feedback from its senior editors, infrastructure, and videographers, as well as helping the project financially with the expenses of public registries and field trips.

So far so good, and by January 2017, the assignment had more resources and hands available and was now a priority for *Animal* (it had an estimated publication date of June-July). *Animal*’s chief editor redistributed the workload among the newsroom personnel to cover the two reporters’ daily work, giving them the necessary time and leeway so they could work exclusively and full-time on this assignment. Furthermore, there was a division of labour among the three reporters assigned: each one picked a group of state universities and companies to investigate. Following the known steps, it was just a matter of using public registries to dig into the companies and their business partners and create lists and diagrams to identify those crass and careless “emerging coincidences” between companies (same address, same partners, same contact email, same three competitors, etc.) and their connection to the close entourage of a top politician, like Duarte. Everything was fine, except this time reporters had a practical problem: after months of hard work, no clear coincidences were “emerging”.

⁸⁵ Interview, 6th February 2018.

⁸⁶ As the MCCI chief editor told me, initially two MCCI reporters were assigned, but very quickly the second had to withdraw and focus on other investigations, such as the Paradise Papers (published 5th November 2017), to which MCCI had access, but *Animal* did not.

5.2.1 FINDING ANOTHER DUARTE

Before analysing how our reporters dealt with these practical problems, let me use Gaye Tuchman's metaphor of the "news net" to illustrate the dilemma they were facing. In her classic ethnography, Tuchman recounts that "instead of blanketing the world by their independent efforts, the news media and the news services leave the same sorts of holes in the news net, holes justified by a professionally shared notion of news" (1978:23). Imagine then the universe of possible occurrences and stories as a sea, and the news media as a village of fishers, each with different boats, fuel supply, crew, and market requirements, but with shared conventions (they often get together and chat at about fishing and share tips) of where and how to catch, and what is considered a good catch (or newsworthy). This, following Tuchman, explains the homogeneity and status quo reproduced by the news. In other words, fishers routinely disperse the same type of news nets at the same point in time and in the similar space of the sea of events: those areas close to powerful, centralised, and official sources, which are known in the trade for being relatively high-return, quick, and easy catches. On the downside, it means that readers have hardly any variety in their news diet and do not know what is going on in the uncharted areas of the information sea, which are rarely visited.

Going back to our case, Tuchman's concepts of the news net, typification of news, and source centralisation are very useful for explaining those ritualised, prescheduled, and routine pieces that are produced, for instance, every year when the new ASF report is published. However, this frame does not fully explain cases of news heterogeneity, that is to say, what happens when journalists catch a strange fish (when not even a "what-a-story!" routine can be invoked). What were the arrangements in place for this to occur? To what extent can journalists react by doing things unconventionally, by paying the cost, and going to the trouble of innovating?

To expand the metaphor a bit further, by early 2017, *Animal* and MCCI had cast their news nets in a routine area of the information sea (the ASF reports) – there was nothing unconventional about that; however some of their most experienced fishers were able to identify some strange movements in the water, and made the decision to fish at greater depths and using a news net with a different type of mesh, one they knew had proven useful in the past when they caught a big fish (Duarte's case), as well as having patience and offering plenty of time and fishing line to their reporters.

This was possible, in the first place, due to *Animal* and MCCI's particular newsroom social-organisational models, which, with a few variations, resemble what Ella McPherson has described as a "reportage model" (McPherson 2012). In general, both newsrooms have a flatter hierarchy and more decentralised distribution of newsroom credibility, which in practice translates into more horizontal (but still adversarial) negotiations between editors and reporters, where source diversity,

topical specialisation, and autonomy of the latter are valued as “something that can endow the publication with knowledge-based authority, and therefore, as an enhancer of credibility” (McPherson 2012:2313). Nevertheless, a couple of qualifications are in order, for these particular newsroom configurations are driven by a combination of market-oriented decisions, but also by decisions regarding the editorial line and a legitimate positioning of their agenda in the public sphere.

On the one hand, as a non-profit (*donataria*), MCCI is not strictly a news outlet, but an advocacy organisation with an anticorruption mission that is funded by private donors and Mexican industry barons, directly linked to Kimberly-Clark Mexico and the Consejo Coordinador Empresarial, the most important organisation of Mexican business moguls and the economic elite. This connection with the top private sector and MCCI’s refusal to publicise its donors have been a source of scepticism and a difficult position to reconcile for the journalists working inside the organisation, as well as a point of criticism within the journalistic trade. On several occasions, I observed MCCI’s journalists reassuring their colleagues that their guard was up the whole time during this temporary alignment of interests and that they would quit at the first sign of interference or censorship from business moguls (and indeed some of them have struggled with this positioning and have since quit).

Besides its team of eight journalists, MCCI also has one applied research unit and a strategic litigation unit. In this sense, MCCI is more akin to what Mark Lee Hunter et al. call “stakeholder-driven media”, that is to say, “media created and controlled by communities of practice and interest” like NGOs or think-tanks (Hunter, Van Wassenhove, and Besiou 2017:5), which hire experienced journalists to focus specifically on investigating stories to advance their mission/agenda and, contrary to news outlets, are not necessarily event-driven. However, this does not mean that its reporting is merely used as input for policy-oriented reports; on the contrary, it follows journalistic standards and is presented as news. Thus, since its creation in November 2015, MCCI’s reporters have worked simultaneously on three or four long-term *especiales* and its journalistic unit as a whole publishes around 15 to 20 special assignments with follow-up pieces each year on its website and social media platforms. Moreover, with the aim of increasing its agenda-setting power, outreach, and impact, MCCI usually negotiates temporary alliances of collaboration and/or dissemination with mainstream news media like *Reforma* and *El Universal*. Consequently, the MCCI newsroom organisation favours investigation over speed, and expertise over hierarchy, partly due to its thematic specialisation in corruption revelations, and even though its special assignments compete with other media for attention, its goal is not necessarily to gain news market share.

On the other hand, *Animal Político* started in 2010 as a lean digital start-up, which for the first year published only through a Twitter account and gradually began consolidating its presence towards a younger audience (18-35 year olds) and commercial advertisers through two websites: one a hard news site and the second a lifestyle/gourmet site. As a result, *Animal*'s case is one of competition through differentiation, but which is less instigated by technological limitations “vis-à-vis other forms of media” – as could be the case between print and electronic media or analogue and digital – than it is a strategy based on the “estimation that there is an attractive gap in the market of news products” (McPherson 2012:2311). Thus, *Animal* competes within the digital Mexican ecosystem through content differentiation rather than through content aggregation and clickbait, but at the same time its website feed has an emphasis on daily news (*nota del día*), which does not aim for the immediacy of 24-hour coverage and instead relies on more curated and contextual news, produced by a desk of co-editors (*redactores*) and complemented by reporters. With a workforce of less than 30, including directors, senior editors, and multimedia staff, *Animal* is still an austere and relatively small newsroom in the Mexican media system. Consequently, *Animal*'s group of five to seven reporters works at three different paces: daily, weekly, and long-term (as was the case in the special assignment we are studying, La Estafa Maestra).

However, competition through differentiation has proven to be a trade-off. On the one hand, *Animal* has struggled to achieve financial stability, which in 2018 led to its merging with *Newsweek en Español*, but on the other hand its brand reputation and credibility has been consolidated thanks to its coverage of events like the #YoSoy132 student protest and human rights violations, as well as fact-checking projects (*El Sabueso* and Verificado2018) and high-impact special assignments such as Las empresas fantasmas de Veracruz and La Estafa Maestra, which in recent years have won several national and international awards. Additionally, in its op-ed section, *Animal* has opted for differentiation by collaborating with and giving a space to a constellation of NGOs, think-tanks, and academics to comment on and disseminate their research and data on human rights, transparency, accountability, education, the environment, etc. All of this has contributed to a self-reported 54% growth in their viewing figures in 2017 (around 4.5 million views per month).⁸⁷

Nevertheless, having a more horizontal and decentralised newsroom organisation, along with the time, leeway and resources this implies for the reporters' work, is just half of the story. What happens when the newsnet of these media catches a strange fish that moves under water like nothing you have ever seen before (or, in the case of La Estafa Maestra, a school of fish – namely

⁸⁷ See <https://www.animalpolitico.com/columna-invitada/editorial-animal-newsweek-espanol-anuncian-alianza/>.

shell companies without evident “emerging coincidences” between them), and you are not entirely sure how to pull them out of the water?

To complicate things further, the standardised series of steps or known “methodology” that reporters were following to investigate corruption and shell companies does indeed have practical advantages, but it also has a caveat for, as Tuchman points out, it “imposes sequences of questions and answers on news events” that can make it difficult for the reporters to grasp the unplanned, the singular, the unpredictable. In Tuchman’s words:

by their very availability as resources, these professionally validated sequences encourage a trained incapacity to grasp the significance of new ideas. Instead, new ideas and emerging social issues – innovations – are framed by past experience. [...] Lacking the appropriate questions and answers, blind to the possibility that there are questions and answers they do not know, reporters may not “be able to get a handle” on innovation. To make it a suitable topic of news, they may dismiss it, mock it, or otherwise transform it. (1978:215)

Something similar happened with our three reporters, who in separate interviews told me rather frankly about the trouble of not finding the “emerging coincidences” they were initially looking for:

Reporter 1: there was a moment when we said “we’ve dedicated four or five months to this piece and we thought there was no story”, because we weren’t finding the Veracruz schema, the Duarte scam. But what we hadn’t realised, in hindsight, was that it was a much bigger and more difficult schema to investigate, because it was more sophisticated.⁸⁸

Reporter 2: we wanted to find a connection between all the companies, we wanted them to be connected with someone and for someone in turn to be connected with the government entity, for it to be like a circle.⁸⁹

Reporter 3: we thought we were going to find the same Duarte scheme, and even though in the end the story was somewhere else, we were trying to cling to that schema and that was a mistake [*the two other reporters nod their heads*].⁹⁰

Notice the contingency of their decisions at this stage (spring 2017): confronted with these conundrums, several things could have happened next, as they were even considering dismissing the case as non-news (“we thought there was no story”). According to Tuchman (1976:215), our reporters could conventionally “dismiss it, mock it or transform it”, perhaps recycling the data into daily news production or saving it until later developments could reactivate the case. Following Becker (1982:34), they could very well have opted for the organisational status quo and “conventional ease” – except that they did not. Also, notice how their accounts are framed a posteriori: as a mistake, but also as a conceptual hurdle that was eventually overcome, enabling them to “get a handle” on new ideas and “more sophisticated” and “bigger” social phenomena, which, in the end, were reconsidered as newsworthy (“the story was somewhere else”).

⁸⁸ Interview, 9th February 2018.

⁸⁹ Interview, 2nd March 2018.

⁹⁰ Fieldnotes from CIDE workshop, 14th October 2017.

Furthermore, all this unconventional trouble involved more work for them, something “more difficult to report on”, thus resulting in the postponement of its publication date until early September 2017.

Consequently, in the next section, rather than sticking with Tuchman’s functionalist idea of routine and professionally validated blinkers, I frame this journalistic work not only as delimited by organisational constraints, but as part of a network of expertise, which I argue can help us to understand the unconventional practices under which our reporters could conceive of questions and answers they did not know. In other words, what happens when a strange catch requires one to draw on other types of expertise: when the fishers need to step outside their profession and consult marine biologists, a scuba diver, or the coastguard to make sense of what is moving under their net?

5.3 NETWORKS OF EXPERTISE

Let’s go back to early spring 2017. Following their agreed division of labour, our three reporters had been trying to make (according to each’s working process) their own lists and disaggregated spreadsheets to manually cross-reference the data on the owners and partners of the selected companies. Remember that tangled diagram from Duarte’s case (Figure 5.2, above) with purple and pink spiderwebs connecting the companies in yellow highlighter? This time, the process of finding and visualising those patterns was proving more challenging.

First, the sheer number of actors and transactions involved in the sample was several times bigger than in Duarte’s case. Even though at this point the reporters working on *La Estafa Maestra* had decided to narrow their sample down to only the contracts signed in 2013-14 between 11 federal agencies and eight state universities (involving around \$420 million USD), in practice this meant collecting and analysing data on around 186 potential shell companies, whereas Duarte’s case involved just 21 companies. Second, the level of complexity and variation of the phenomena was also higher for several reasons: 1) in some cases there were up to three layers of money transfers: from the government agency to the public university, then from the latter to an outsourced company and finally sometimes the money was transferred again to a second outsourced company; 2) all these transaction were done via three mechanisms with different degrees of traceability: contracts, agreements, and simple bank transfers; 3) this scheme was not circumscribed to reporting in one subnational state (for instance Veracruz, in Duarte’s case); this time the federal agencies, universities, and outsourced companies involved were operating in six states. In sum, the reporters were dealing with a highly heterogenous sample in terms of the combinations of ploys, local jurisdictions, as well as “onion” layering, and counter-forensics aimed

at breaking the link between data and identifiable individuals, hence no “coincidences” were visible, at least at first glance.

Faced with information overload – a sea of data, *un mar de información*, as they called it – and a complex constellation of traces, our reporters met a practical impasse, for, as they recounted rather modestly, their journalistic training had not specialised in corruption or shell companies, nor they were newsbeat reporters (*de la fuente*) who gradually cultivate sources and expertise by spending several years covering the same beat on a daily basis:

in this kind of topic [shell companies], it's crucial, because me as a reporter, *I'm not trained* to know stuff about the SAT [Tax Administration Service], I've only recently learnt about it, I had no clue. I've been learning things from this piece, you know? From questioning people who really know... because you can make absolutely shocking errors if you just go it alone.⁹¹

This is far from being atypical in Mexico, where, according to recent surveys, only 21.5% of journalists working in Mexico consider themselves specialised in covering only one beat or theme, whereas the rest cover several information sections. However, this does not mean our three reporters were novices; in fact, they each had a career of more than 10 years in different local and national media outlets as daily news reporters covering metro, migration, education, electoral campaigns, etc. – a profile they share with 55.5% of journalists in Mexico (Márquez Ramírez and Hughes 2016:115). In this sense, they did what most people do to quickly improve their topical learning curve, but also to deal with the risk of mistakes and of the uncertainty that comes with higher complexity: they started searching for people they could learn from and mobilising their cooperation.

5.4 TRANSCRIPTION DEVICES

Let's return to our reporter's practical problem of coding, cross-referencing, and visualising patterns among a constellation of “dispersed” traces, a process which by early 2017 had been conducted separately in lists and spreadsheets of varying styles and forms, depending on each reporter's criteria. This changed thanks to the intervention of another member of *Animal's* newsroom, an information designer who joined the reporters and came up with the idea of creating a single, collaborative, and systematised database with homologised categories and filing criteria, which was designed to be fit for programmers to work on later (i.e. by using comma separated values, data dictionaries, a single row for a single company, etc). As the information designer recounted:

⁹¹ Interview, 6th February 2018.

There came a moment when [the reporters] didn't know where to go with it, that's to say, they made millions of [FOIA] information requests and from one day to the next they started receiving boxes and boxes and "pdfs", so then it was, what the hell do I do with all this information? [...] "Everyone can make their database as they please" – that was one problem, right? In this case, there were three journalists. Each journalist made – and I'm not saying it was a bad idea, the thing is we didn't know, it was all a learning process – each one made a different database and then gathering all that into a single database was a major challenge.⁹²

Like what we saw in the previous chapter with the Panama Papers, securing the cooperation of programmers and information designers to procure tailored computerised tools was key for tackling information overload, hence making data intelligible, visible, and searchable for journalists. All three reporters involved in La Estafa Maestra agree that the contribution of the information designer was crucial, but this does not mean that the interactions with this professional "outsider" and their learning process was smooth and free of intense negotiation, for instance deciding the order and pertinence of each category in the matrix for the special piece:

Reporter 1. That meant another round with [the information designer], because [they]'d say "all of this needs to be readable in the database" and I'd be like "no, this is a schema, it's the schema of company A and that can be sent out" and [they]'d say "sure, but all of that has to be in the database" and I'd be like "no it doesn't!" So, designing that database was sort of "hey, here we can add in a column for how many contracts this single company received" [...] So, actually, the [Estafa Maestra] schema *is* all in one database and *you can read it perfectly*.⁹³

This intense give-and-take between reporters and information designer constitutes a first trade-off: an instance of "exchange and dialogue" within a nascent network of expertise. For the reporters, "having to translate bureaucratic processes into columns and rows in a spreadsheet"⁹⁴ at first weakened their autonomy to analyse their data as they pleased, but at the same time their dialogue and exchange created what Eyal, drawing on Latour, calls a "centre of calculation", where "the statement/performance loses certain qualities it possessed before and acquires new ones" through "transcription devices" – such as the database – and "a concrete form of reasoning" (2013:874). As a result, this process of intellectual sparring enabled them to closely reexamine their assumptions because an analytical justification was required anytime someone suggested adding or deleting a column or entry; as one of the reporters recalled: "we gave a lot of thought to each cell because the money could slip through any one of them".⁹⁵

Moreover, even if initially they showed some resistance, reporters were pushed to think through and desegregate the categories they thought of as self-evident, thus enforcing group reflexivity:

⁹² Fieldnotes from CIDE workshop on investigative journalism, 11th November 2017.

⁹³ Interview 9th February 2018 (my italics).

⁹⁴ Fieldnotes from CIDE workshop on investigative journalism, 14th October 2017.

⁹⁵ Idem.

Reporter 1. [The information designer] would ask me, [they]’d question me “but this company, how could we classify it?” and I was like “irregular” – “but why irregular, what does it have or not have?” – and I’d say, “well, this”. And so based on that we created several categories of irregularities and with them we could determine how many types of irregularities were present in a particular company. And so we could classify it as irregular or even as a ghost, and that’s where teamwork became crucial.⁹⁶

This on-going process of sifting out the database entries took several months, but in the end resulted in a matrix of 75 columns/entries on key information and transactions from 186 companies (13,950 cells in total), all organised into five sections: “company”, “contract”, “agreement”, “transfer”, and, for unfolding connections, “other related data”, as shown in Figures 5.3 and 5.4. In the words of the information designer:

it was a very long process, it was very complicated to reach a conclusion, we spent months and months trying to agree on how many categories there were between contract, agreement, and transfer. This was the result of a lot of work [...] we explored almost all the possibilities for this database, and we didn’t find a single extra cell than what was necessary.⁹⁷

EMPRESA	CONTRATO	CONVENIO	TRANSFERENCIA	OTRO
EMPRESA <ul style="list-style-type: none"> - Razón social - RFC - Folio mercantil - Objeto social - Fecha de creación - Capital social mínimo - Dirección fiscal - Entidad Federativa - Teléfono - Web - Correo electrónico 	REP LEGAL, ACCIONISTAS, ADMIN, COMIS/CONSE <ul style="list-style-type: none"> - Nombre completo - RFC - Dirección - Nombre de la dependencia donde fue funcionario - Último año en activo de la dependencia donde fue funcionario 	NOTARÍA <ul style="list-style-type: none"> - Nombre del notario que firma el acta - Número de la notaría - Dirección de la notaría 	INFO OFICIAL <ul style="list-style-type: none"> - Estatus - CompraNet - InsosolRUPC - NomsolRUPC - RegCompravent - Empresa fantasma o no localizada (SAI/activista) - SAT/presenta - ASF/no localizada - Simviti/Reg 	
	CONTRATO <ul style="list-style-type: none"> - Empresa, dependencia o instancia que otorga los recursos - Número de contrato - Fecha de inicio de contrato - Fecha de término de contrato - Servicio/obra realizada - Nombre de la persona que firma - Cargo de la persona que firma - Monto total de contratos recibidos 		TRANSFERENCIA <ul style="list-style-type: none"> - Montos de contratos individuales - Cantidad de contratos y/o licitaciones otorgados - Número de licitación - Fecha de fallo de la licitación - Monto total de la licitación - Empresas subcontratadas - Monto por empresa - Monto neto que recibió la empresa (restando lo que lo transfirió a otras empresas) 	OTRO

Figure 5.3: Final version of the disaggregated entries of two of the five general sections (“company” and “contract”) of La Estafa Maestra’s database

⁹⁶ Interview, 9th February 2018.

⁹⁷ Fieldnotes from CIDE workshop on investigative journalism, 11th November 2017.

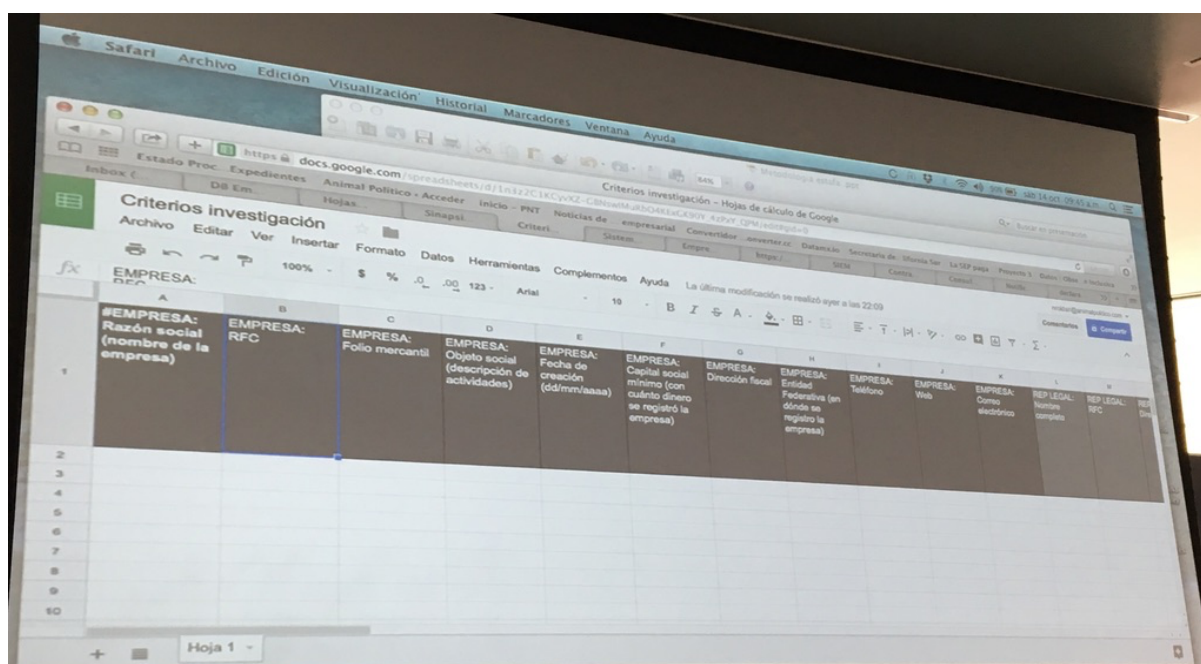


Figure 5.4: Disaggregated entries or columns discussed as pertinent for the “company” section in La Estafa Maestra

When asked if there were columns/entries that were not relevant to La Estafa, the reporters said “yes, but [the information designer] strove to include them... [they were] thinking about the criteria to develop a [computerised] programme, in the future”.⁹⁸

The logic behind this software (SINAPSIS was the preliminary name they were considering for it at the time of my fieldwork) was to reduce the time spent manually cross-referencing and make it an open-access research service for other journalists (or in fact other types of investigators) to upload their own databases and automatically analyse and find relationships and patterns between companies. In this sense, the Estafa database was not merely a spreadsheet for organising the data of one case, it acquired new qualities as a “an apparatus (*dispositif*) that produces, reproduces, and disseminates expert statements and performance” (Eyal 2013:872). As a result, the selected column entries were designed to translate the bureaucratic processes for constituting legal companies and transactions so that even “the empty cells were newsworthy”,⁹⁹ hence the need for including entries that were not relevant for La Estafa, but which could potentially help diagnose a broader universe of wrongdoing practices involving “ghost companies”. Thus, through the give-and-take between the reporters and the information designer (an exchange that was also informed by the contributions of other actors, as we shall see in the sections below), the database was gradually assembled until they “couldn’t agree on one more cell that was necessary”, in other words, until it

⁹⁸ Fieldnotes from CIDE workshop on investigative journalism, 14th October 2017.

⁹⁹ Idem.

became a readable (“the scheme can be read perfectly”) and reproducible transcription device. Or, as Eyal calls it, following Latour’s concept: an “immutable and combinable mobile that can be transported from one site to another without deformation”, within a network of expertise, for formulating and addressing the problem in one particular way among many possibilities (2013:872).

Of course, at the time the database was far from looking as refined and standardised as it appears in the figures above. These, since the publication of the piece, have been presented in several workshops in Mexico and, as often happens, have experienced a process of “black boxing” that tends to obscure the “complex make-up of expertise” in which “alternative devices, actors, concepts, and arrangements [were] still viable candidates” (ibid.:871). In other words, to discard or defend the pertinence and permanence of the Estafa columns’ entries was a deliberate and deliberative choice, since “the act of categorizing is an act of theorizing” (Tuchman 1978:205). In fact, to assemble this transcription device, as well as the statements and “concrete way of reasoning” it entails, at different moments of the investigation, the reporters needed to establish relationships and secure the cooperation (with different degrees of involvement) of civil servants, auditors, lawyers, and activists.

5.4.1 BACKGROUND SHORTCUTS

A first set of very solemn and institutional interviews sought by the reporters responded to their need to better understand how bureaucratic procedures and legal requirements for companies worked, as well as practical ways of obtaining documents to verify the key steps of these processes. As one of the reporters recounted:

what we were interested in was the previous step. To know what an illegal company looked like, we had to know what a legal one looked like, right? [...] That was a piece of advice that [a MCCI senior editor] always gave in [their] workshops. To be able to find the error, first we have to know how it should have been done correctly.¹⁰⁰

There were various alternatives for accomplishing this reverse-engineering of the operations and steps followed by companies. One way of doing it was to spend precious time and effort reading all the legislation and administrative texts. However, it takes time to research, find, and organise new information in ways that are useful to journalists. Thus, finding effective shortcuts for reducing one’s learning curve – even in the case of public information – is vital. For this purpose, the journalists contacted the press office of the Secretariat of the Economy (SE) and obtained a two-hour, on-the-record interview with a civil servant, who agreed to answer their doubts in very formal and institutional way:

¹⁰⁰ Interview, 9th February 2018.

that's when we *discovered* what the mercantile registry was, a recorded entry in the Secretariat of the Economy, and that it was the first step to building any company. So if it was missing, that was a serious irregularity [...]. It wasn't like we were asking them for information about specific companies, it was only for them to help us *understand* how the mechanism worked.¹⁰¹

The interview also proved useful for avoiding mistakes, for instance by using governmental databases that were incomplete (i.e. the Integrated Registry Management System, SIGER 2.0), or that did not constitute valid proof of the de facto existence and legality of a company, such as the Federal Taxpayer Registry (RFC), which, according to the civil servant, did not exclude the use of counterfeit documentation to simulate operations:

when we found out about the mercantile registry, we asked them how to get hold of it, "can we get it through Transparency [FOIA requests]?" [...] We asked, "if we can't find a company in SIGER, does it mean it doesn't exist?" and the answer was "no", [they explained to us that] "to verify it doesn't exist, the Secretariat of Economy has to confirm the company is unregistered". So thanks to that we were able to determine that the way to verify it was through information requests [...]. Thanks to that, each one of the interviews with experts helped us *to know what to ask for* via transparency [requests].¹⁰²

Another obvious key source to cultivate was, of course, the ASF auditors, whose work and annual reports were the main triggering factor for the special assignment. Nevertheless, as the reporters recalled, the first meetings proved that the auditors were a tough nut to crack:

[Reporter 3] We went many times to the Audit Office, to talk to them, but they never said to us [*lowers voice*] "look, there's a secret here". I mean, nothing. In fact, whenever we visited them, we left feeling rather frustrated because the ASF is really far away and [the auditors] would be like "yeah, well everything's there in the public report, what more can I tell you, we've made the legal complaints, it's all in there".¹⁰³

[Reporter 1] [...] there are colleagues [journalists] who believe the ASF leaked the whole thing to us, and I can't tell you how it makes me laugh, because of how many times we tried to say to the ASF "look, this *is* a crime isn't it?" or "from here where should we go, what would be a good line of enquiry?" and I swear that the ASF never told us a single thing that wasn't already published in the report, they never gave us one bit of information, let alone a case file, not a single bit of information, ever.¹⁰⁴

I find various aspects of these passages to be revealing. Firstly, indeed, some media competitors not only tried to discredit the piece by calling it recycled non-news or a mere leak, hence reducing the reporting to passive typing – a claim that, surprisingly, was invoked in different instances during my fieldwork, even in reference to investigations renowned in the journalistic community as "Peña Nieto's White House". More importantly to us, this implicitly portrays the value and relationship customarily attributed to civil servants as sources: they leak secrets to you. Secondly, and in contrast with this shady image of manipulation, the way the Estafa reporters describe the auditors' initial behaviour is one of restraint and moderation, of sober, polite, but

¹⁰¹ Idem (my italics).

¹⁰² Idem.

¹⁰³ Interview, 6th February 2018.

¹⁰⁴ Interview, 9th February 2018.

careful exchanges, where no privileged information was given away. As frustrating and unappealing as this could seem for the journalists, this is a vignette of civil servants sharing nothing more than what was already in the public domain, but also – and rightly so – nothing less than a strict compliance with their bureaucratic constraints and regulations, since any excess on their behalf could potentially jeopardise the legality of the audit process.¹⁰⁵

In fact, there were strict institutional arrangements in place regulating the flow of information and credibility of the ASF. As part of the creation of the National Anticorruption System in July 2016, the new Federal Law of Oversight and Accountability (LFRCF) and the reform to the General Law of Administrative Responsibilities (LGRA) were enacted, which had important implications for auditors: 1) ASF reports could not make information public that was considered reserved for or relating to an ongoing investigation (Cámara de Diputados. 2016a, art. 5); 2) it is prohibited for either the Auditor General or any special auditors to share or disseminate with third parties any confidential or reserved information in their possession (*ibid.*, art. 92, III); 3) breaching the latter could have amounted to an obstruction of justice for any civil servant involved in the audit process (Cámara de Diputados. 2016b, art. 64, I, III), or in the case of the Auditor General of Mexico, cause to be removed from the job (Cámara de Diputados. 2016a, art. 93, I); and 4) interestingly, another cause for the dismissal of the head of the ASF is “accepting the influence of political parties” or “being partial in oversight” (*ibid.*, art. 93, IV). This meant that preserving an image of neutrality and impartiality was extremely important in ASF public interventions.

Thirdly, notice how reporters tried several times to elicit the auditors’ cooperation, not by asking for input, “facts”, files, privileged information, or even quick quotes, but for an *exchange of practice*, advice on their lines of enquiry and interpretation of scenarios – an exchange which, strictly speaking, was not forbidden by law, but required a solid relationship of trust. This arrangement was not quite in place yet and was only just starting to be built, but then again, similar to the Secretariat of the Economy, the auditors *did* contribute background knowledge and clarifications to the ASF reports in these early stages, which the reporters described as valuable in a very specific way, for it helped them to understand (*entender*).

5.5 CLINICAL EXPERIENCE

Another set of more informal and sometimes off-the-record interviews that reporters sought responded to their need for something that could not be found in legal texts, public registries or freedom-of-information requests: namely, a type of knowledge and judgement that resembles what

¹⁰⁵ For an example of a nuanced analysis where there is room for this type of uncommon vindication of Mexican civil servants’ work, especially rare in the current political discourse of anticorruption, see Mauricio Merino (2015).

Howard Becker et al. call “clinical experience”. That is to say, “knowledge that has not yet been systematized and scientifically verified” and which, contrary to textual or “book learning”, one acquires in practice “by seeing [...] phenomena and dealing with [...] problems at first hand” (1992:231). Becker et al. developed this concept by studying the importance that faculty and students in medical schools give to practical ways of recognising symptoms, legitimately “performing physical examination and interpreting its results properly”, which “may be learned only by use of the senses” through continuous trial and error and exposure to a wide variety of case studies (ibid.:231–32). However, I make the case that clinical experience is valued in a similar way within the journalistic culture I observed during my fieldwork. In fact, it was crucial: on the one hand, for the reporters, who at the time had “great difficulty in hearing, feeling and seeing what they [were] told [was] there” (ibid.:232) and, on the other, for the network of expertise to increase its “capacity to craft and package its concepts, its discourse, its modes of seeing, doing, and judging” (Eyal 2013:875–76). This created a shared perspective and order of treatment that allowed them to “objectify symptoms”, in this case among “ghost companies”, “as defined (categorized) diseases”, namely, a Master Scam (Tuchman 1978:59). The following accounts describe the different ways in which “clinical experience” was valued by the reporters.

First, through their senior editors’ contacts, our reporters met several times off the record with a former high-profile official from the Tax Administration Service (SAT), who, as part of the 2013 Tax Reform, was deeply involved in designing and implementing what would later be known in the media as “the SAT blacklist” of companies invoicing simulated operations (EFOS in Spanish). As I will describe in further detail in the sections below, this was another key transcription device and centre of calculation for strengthening the audit expertise network. For now, let’s say that this former official had a long career in the SAT and had spent at least four years investigating the various ways companies could simulate operations, in other words, how to identify the symptoms which could point to companies that looked in good fiscal shape on paper, but in reality were inexistent. As a precedent, this same SAT team had a very active response following the publication of *Animal’s especial* on Duarte’s case on 24th May 2016: 1) from day one the SAT not only investigated the four public entities and 21 companies identified in Duarte’s special assignment as “ghost” companies, but expanded the network under investigation to 11 public entities and from 26 to 34 companies involved, which were included in their public “blacklist” of potential EFOS or, as they called them, “façade” companies (*empresas fachada*); 2) in July, they started official tax audits, which involved cancelling the companies’ invoicing certificates and freezing bank accounts as a precautionary measure; 3) SAT filed 32 lawsuits with the Attorney General’s Office (PGR); and 4) in late August, they announced that several civil servants, as well as active and former governors in five different states, including governor Duarte from Veracruz, were being

investigated (Ángel 2016; Animal Político 2016). However, only two weeks after these last actions were taken, on 7th September 2016, the head of the SAT and his senior officials resigned – an event which within the Mexican government could also mean being sacked, and whose timing was described by our reporters as “very curious” and ironically contributed in their eyes to the credibility of the former civil servants involved in that office. It was a case of winning by losing: they lost their jobs but won credibility as sources among journalists.

The changes in the SAT’s leadership meant for our reporters a shutdown of any official communications with this entity. Apart from a diplomatic initial meeting between the head of the SAT and *Animal*’s directors and reporters, the new management stopped answering the reporters’ messages and its institutional response turned passive and conspicuously absent. So, when our reporters started working on the Estafa assignment, they approached the former SAT official:

[Reporter 1:] the first meeting we had with [the former SAT official] – in fact we hadn’t even got that far, it was more about us explaining to [them] that we had this suspicion, that we had this series of hints. And [they] confirmed to us as well that there were [irregularities]. [They] didn’t tell us what to do but [they] gave some examples of other irregularities he’d encountered while working in the SAT [...]. In that first meeting *we tried to get some serious information out of [them]*, but [they] never gave anything away. In fact, [they] explained to us how companies worked, legal and illegal ones, and about their invoicing, so basically *it was a lecture* more than an interview with off-the-record information.¹⁰⁶

[Reporter 3:] [they] also explained to us what the first thing was that clicked for [them] [*snaps fingers*] when [they] worked in the SAT, a red flag so to speak, “hey, check this company out”: it was, for instance, when its shareholders were people living in small ranches or poor areas. All of this helped us understand things when we were out doing fieldwork, because we said to ourselves: “a company that has won 500 million [pesos ...] and its funding partner is a guy living in a ranch? Well maybe the ranch is a fucking mansion, or maybe it isn’t, so those things kept flagging up alerts like “you have to check it out, no question”, that helped us a lot, most of those things *we didn’t even publish*, but it helped us a lot to understand what we were talking about, what the problem was.¹⁰⁷

Let’s analyse these passages bit by bit. First, notice how suspecting wrongdoing and dealing with open leads entails a feeling of uncertainty, which, often in my interviews, journalists described as a craving to “gain confidence” in one’s work and report their choices on leads. In this sense, the meetings with the former SAT official were valued not as an opportunity for obtaining outstanding secret information and leaks, but, interestingly, in terms of a masterclass, of gaining the clinical experience of someone who, in Becker’s words, has “seen [similar] phenomena” (ghost companies) and “dealt with problems first hand” about how to distinguish between the symptoms of legal companies and illegal ones. This is not to argue that, by some moral principle, ideology, or habitus, the reporters repelled the use of leaks or privileged information as a legitimate input (*datos en serio*); in fact, as the vignette illustrates, they actively tried to get them (*tratamos de sacar*). Nor is the value they attributed to the masterclass and their gaining of “understanding” a mere by-product of, or

¹⁰⁶ Interview, 9th February 2018.

¹⁰⁷ Interview 6th February 2018.

reaction to the denial or scarcity of privileged information. My point is that even if the reporters could have obtained leaks or secret information on specific companies, these do not fully explain the way that La Estafa Maestra became an “immutable and combinable mobile” for talking publicly and within the network of audit expertise about a system of corruption – rather than just one more in a long line of isolated occurrences.

Therefore, it is not only access to records and privileged information that matter, but also the knowledge and clinical experience to link a sea of data to a credible argument, which above all is a conceptual endeavour, as the data never “speak for themselves”. In the words of one reporter:

[Reporter 2:] sometimes it’s a bit frustrating because you can find relationships among the data and it’s like, “ah, I found something! And it’s connected to... what?” So, I think it’s really well designed, they’re cells that are seemingly unconnected. We know they’re related in some way, but we haven’t managed to find the thread that binds them; they operate separately, so to speak, the only thing connecting them is that they function in exactly the same way, but there’s no one person or recipient, or any entity that connects them in a clear way.¹⁰⁸

Even if one can have access to more information, “reporters must know what questions to ask the source, what ‘facts’ to find” (Tuchman 1978:81). And even in newsroom configurations which enable more plurality of sources and flexibility in the typification of news, without the collective expertise for developing an effective conceptual arrangement, “without having some idea of what might be the heart of the matter, the story to be told, each occurrence could maintain its claim to idiosyncratic treatment” (idem) – and thus, information could remain merely the unrelated raw material of news.

Second, notice how the analytical sparring with civil servants is valued as a way of learning how to hear and see “alarm bells” (*botar alertas*), and associate those signs – like the disparity between the amount of money allocated to one contractor and the display of wealth at the company’s tax address – to an order of treatment (*tiene que checarla, fijo*). Procuring the cooperation of the former SAT official proved useful in a way that no audit, blacklist, FOIA request, or document could match: the official shared knowledge on how “ghost companies” and their associates looked, sounded and smelled on the ground and, more importantly, how this could be translated into their database.

In practice, sometimes clinical experience arose from unexpected situations. For instance, in the final three or four months before publishing, the reporters used the collected data to carefully plan fieldwork in six states to visit the addresses and shareholders of over a hundred suspicious companies in their database. On one of these trips to the southern state of Tabasco, they hired a taxi driver to take them to the addresses, who happened to work part-time in the state attorney’s

¹⁰⁸ Interview 2nd March 2018.

office, dealing with financial fraud. This opportunity was described by the reporters as sheer “reporter’s luck” (*suerte de reportero*):

[Reporter 3:] we started to check lots of sites until the [official] told us “you know what it’s going on, these neighbourhoods are invoicing neighbourhoods, where people come to buy and hire front men”. We were like “no, get out of here!” “In the Industrial neighbourhood, a shitload of lawyers’ people come to buy electric or internet bills or water bills from poor people in exchange for a few pesos. With those documents, the lawyers bribe the public notaries, so they create a shitload of ghost companies, which they all have over there, in a catalogue of companies in case they’re needed. That’s why you’re seeing that the shareholders live in poor areas or in ranches”. Of course, what [they] told us, we verified it point by point in the field when we started confirming that the shareholders in our list really did live in poor ranches in neighbourhoods that were sometimes not even on the map.

That really helped us a lot to understand... because we thought we were going to find what [our colleague] found in Veracruz, we were convinced that we would find poor people saying “me? A company? I haven’t a clue what you’re talking about”. It wasn’t like that, people said “well, yes...”. That’s why [the official] helped us and told us “no, they’ll never tell you that, because yeah, they all receive money, obviously they get paid four pesos and don’t know their probably company earned five hundred, but they’re aware of the fraud, even if they’re partly victims so to speak, they’re part of the fraud, they’re participating”.¹⁰⁹



Figure 5.5: Videos published in La Estafa Maestra, showing visual features of the suspected shareholders and companies’ offices, to which public universities allocated public contracts worth millions of pesos (Source: *Animal Político*, 2017)

¹⁰⁹ Interview, 6th February 2018.

Securing the cooperation of this official not only provided the reporters with local knowledge, but it was valuable, following Becker, for informing and comparing their own experience on the ground with “what they are told is there”. Moreover, their own clinical experiences of “hearing, feeling and seeing” how shareholders were working as janitors, and the mould and rust accumulating in some of the offices of companies worth millions, etc., were used later to strengthen the qualities of their statements/performance by using transcription devices such as photographs, videos (an example is shown in Figure 5.5), illustrations, and descriptions. These qualities, as we will analyse in due course, remained invisible and out of place among the other bureaucratic devices of the network of audit expertise, such as the ASF reports or the SAT blacklist. Furthermore, after their exchange with the local official the plot thickened, opening up new and more complex questions about what seemed to be a systemic and “counter-forensic” use of working-class people as fronts (*prestanombres*), as well as the unexpected actors within this network of corruption, such as well-established accounting firms:

[Reporter 3:] because we didn’t know about the bureau of accountants either, we didn’t really know where the ghost companies were coming from, we thought it was a bloke in his house creating a ghost company, but no, they come from lawyers’ offices, which are dedicated to creating ghost companies. That’s why people were telling us “they come here to buy people off”.¹¹⁰

Like their meeting with the official from the Secretariat of the Economy, this clinical experience informed their questioning and helped them later on when they had access to interview the state attorney general, who officially acknowledged that since 2009 his unit was aware of the problem of the involvement of accounting firms and fronts in creating “ghost companies”. Therefore, in the following sections, I wish to explore in further detail how these background shortcuts and clinical experience contributed to the “crafting and packaging” of a conceptual apparatus; in other words, how the problem involving suspicious contractors shifted from the concept of a mastermind to a master scam.

5.6 EUREKA

At this point in the chapter, I might have given the impression that months of reporting had been going by without much in the way of time constraints. This was not the case. Even though an assignment like this by definition has no urgent publication date and no prescheduled events, let’s remember that for a small newsroom such as *Animal*, assigning two out of their five reporters to focus full-time on a single story was a massive effort, which could not be sustained indefinitely. This meant reorganising the newsroom so that the co-editors’ desk and the remaining reporters could cover the daily and weekly work of their colleagues. Moreover, following leads and filling in

¹¹⁰ Idem.

the database meant investing precious resources: getting official documents from public registries usually takes months of paperwork and costs money, not to mention the expenses of transportation, salaries, and fieldtrips. After months of work, in June 2017, the reporters met the tentative publication date initially set by *Animal*'s director, who by that time "was a bit desperate or frustrated and was telling us 'you've spent months on this piece! Really? You still don't have a story for me?'"¹¹¹

However, as I have explained before, the reporters struggled to find a "mastermind" angle, like in Governor Duarte's case, and focused most their attention on looking for "emerging coincidences" between the contractors, universities, and public entities involved:

[Reporter 2:] we just didn't have it very clear. We hadn't realised the number of companies that were ghosts. We were too committed to one dynamic that we hadn't managed to see, to take a step back and see the whole picture. So, we couldn't see that they were connected, not among themselves, but through a kind of system.¹¹²

Thus, facing increasing pressure to deliver results, the stakes were high for the reporters. The risk of calling a "dead end" or "risk of miscalculation" (McPherson 2018:202) on the assignment and wasting scarce resources was real. Furthermore, their reputation was on the line, for, in their words, "we couldn't come out with the silly excuse that 'er, sorry, there's no story'"¹¹³

Precisely in that tense moment, when crunch time seemed to be approaching fast, it was the accumulated cooperation of the network of audit expertise – that "exchange or dialogue" – which enabled the reporters to "reconceptualize the work, so it does not require what is not available" (Becker 1982:35). Simply put, the final work would not have been the same and they probably would have missed the complexity of the phenomena – the rarity of the fish:

¹¹¹ Interview, 2nd March 2018.

¹¹² Idem.

¹¹³ Interview, 9th February 2018.

[Reporter 1:] one day we were fed up and thinking we didn't have a story. [...] And in that moment of stress, and tension, and weariness, I told [Reporter 3] – let's go over it again. Because the schema [...] was more complicated and there were no coincidences among the names of the shareholders, that is to say, we couldn't find that connection, that coincidence. So we had two big whiteboards in the office, and we started: "Sedesol, first step, such-and-such a company, what do we have on this company – ah, it's either a presumed ghost or it is a ghost [according to SAT]. Company no. 2...", and so on, we put it on the whiteboard [an example is shown in Figure 5.6] [...]. When we finished doing the companies, we started to observe the characteristics of the irregularities. Like "this one doesn't have an address and that one..." Then it was like seeing the writing on the wall and we said, "the connection is that they don't exist" and it was like a eureka moment. That marked a before and an after in the investigation, because after that we began not following the coincidences between the names of shareholders or government officials, but focusing on trying to show that the connection was they were all ghost companies [...] and that was a turning point.¹¹⁴

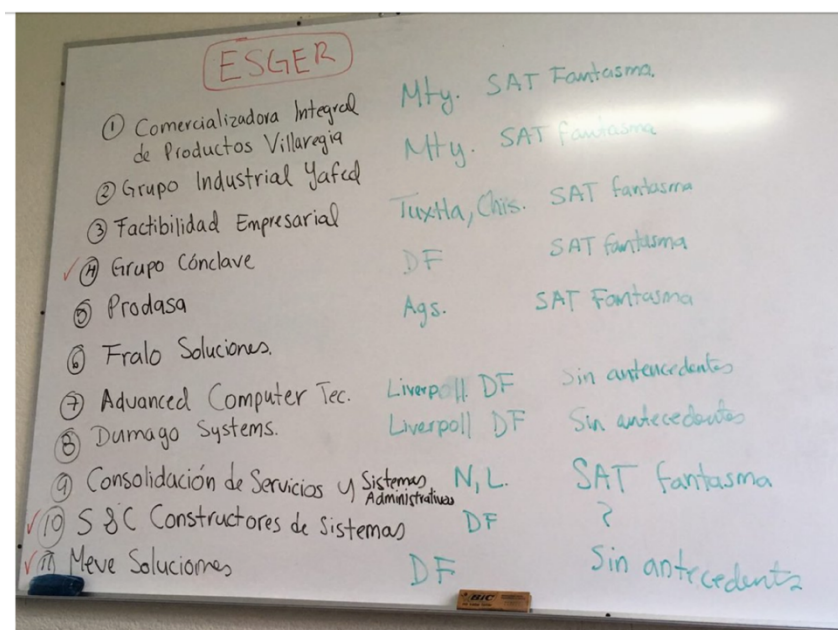


Figure 5.6: Diagram used by reporters for identifying the irregularities or non-existence of suspected contractors in La Estafa Maestra (Source: @Pajaropolitico, 2017)

¹¹⁴ Idem.

5.7 DEGREES OF IRREGULARITIES

Even though this new angle looked promising, publicly claiming that a company does not exist and is in fact illegally simulating its operations is a very delicate and risky affair, not only in its consequences – lawsuits, reputational damage, aggressions, etc. – but also in what Ella McPherson (2018) calls the “risk of mistakes” and the “risk of deception” in political communication and fact-finding, respectively. *Animal*’s director and senior editors were particularly aware of this and, at this stage of the investigation, helped build the necessary defensive work by playing devil’s advocate, thereby pushing the reporters to find ways of dealing with the risk, or, as they called it, *amarrar la nota*. As one of the reporters recounted:

we arrived all excited to the meetings every two weeks. They were “show me what you got” meetings and [the director] would knock our story down like “so there are no employees – that doesn’t make it illegal, give me one law that says it’s illegal” and we were like “OK, we can’t answer that”, then it was a matter of consulting with specialists because even the categories we were assembling were based on interviews with specialists from the SAT and fiscal lawyers.¹¹⁵

So far, different actors used different terms for referring to companies whose existence and legality was in question: *façades* (*fachada*), EFOS, ghosts (*fantasma*), shells, paper (*de papel*). Though these epithets are very evocative, in reality the irregularities and caveats within the pool of companies in the reporters’ database was far too varied and complex for them to fall into just one broad category like the above. As it was stressed to them in another interview with the former SAT official, maintaining caution and precision in the phrasing and categories used was key to avoiding future objections. In one reporter’s words,

[the official] told me “look, the thing is, a ghost company can be anything, mate, I mean, if it’s on the official lists, officially that’s what it is, [but] if you see that a company doesn’t exist, and so on, that’s all well and good, but if the SAT doesn’t declare it as inexistent, then it’s not a ghost company, officially”.¹¹⁶

Nevertheless, at the time, out of the 186 companies only nine were already detected by the SAT’s blacklist as “suspected” (*presunta*) and 11 as “confirmed” (*definitiva*). The question was, then, how to classify the rest of the companies according to the different degrees of irregularity the reporters had detected in their enquiries; how to integrate their experience and local detail into the “chain of transcriptions” connecting other audit actors (Eyal 2013:874).

¹¹⁵ Interview, 9th February 2018.

¹¹⁶ Interview, 6th February 2018.

As a result of this conceptual sparring with editors, sources, and the information designer, our reporters came up with a list of differentiated categories, shown in Figure 5.7, which included SAT, SE and ASF transcription devices, but which also included their own irregularities “according to reporting” – *según reporte* – namely: “ghost”, “allegedly ghost”, “without SE registration”, “without address”, “dismantled according to reporting”, “non-existent according to reporting”, “ASF not found”, “company purpose does not match contracted services”, and, finally, “allegedly in order”. This enabled them not to play it safe or be unnecessarily timid, but rather to play it smart and establish criteria for taking a higher risk (*salir con todo*), depending on the evidence available. This resembles what McPherson calls a “reflexive approach” to the construction of risk, where “practitioners need to consider whether they are or should be making silencing decisions” (2018:211).



Figure 5.7: Categories of irregularities used by journalists for the Estafa Maestra publication (above) and in the database (below) (Source: *Animal Político*, 2017)

The judgment for taking a silencing decision is better illustrated in the case of ESGER, a company labelled in the piece as “the major suspect”, which, without having signed any contract, received \$36.5 million USD from 11 outsourcing companies (Figure 5.6), which in turn had been contracted by public universities to deliver goods and services for the National Crusade Against Hunger. ESGER was one of the most intriguing specimens in their database because:

it had registration, it wasn't dismantled, it wasn't in SAT's lists, it was perhaps, in inverted commas, a “company in order”. The only thing is that we had the ASF complaints [of goods and services not delivered], so we couldn't say this company was a ghost, as such.¹¹⁷

Nevertheless, even if on paper ESGER looked to be and was classified in the special assignment as “allegedly in order”, thanks to the differentiated categories and detail in their database the reporters could establish careful, yet assertive connections and statements, judging what could and could not be said of each company:

that's why we also were very cautious when presenting the investigation because, yes we think they are ghost companies, but officially they don't have... but what we can say is what the ASF says, that this company received money from 11 companies, which, as it happens, four of them are confirmed and five are allegedly ghosts according to the SAT, so how could these companies give money to another company which exists and is legal?¹¹⁸

Indeed, stressing the contradictions of this poltergeist mentality was one of the leitmotifs in the final piece: how can an entity that does not have material existence deliver tangible goods and services to the government? Moreover, this ability to discriminate under a more reflexive approach towards risk was in direct relation with the turn in newsworthiness, from getting the most high-profile politician or shocking sum of money possible, to demonstrating that a sophisticated system of irregularities was in place: not a Ponzi or pyramid scheme, but a Master Scam. As one reporter recounts, this prioritisation was the result of the exchange and dialogue with various actors, including of course directors and senior editors:

for that part, the other teamwork or rather guidance came from [*Animal's* directors] who told us “look I don't care if they are 1,000 million pesos, 500 million pesos, but rather that we have it all fully verified”. We could've included the rest of the companies which had some suspicion, and I reckon we could've easily added 1,000 million more, but we couldn't risk it. But that was [the director's] vision, 'cause literally [they] questioned the investigation all the time, [they were] like “yeah, but if we include this company, are we absolutely certain that tomorrow it won't come out and say “we're a company operating legally and all that”. If we couldn't say “yes, we're certain”, then it wasn't included.¹¹⁹

Additionally, the concept of a systemic scam was fuelled by a couple of interviews with lawyers specialising in tax and administrative law. First, the reporters spoke to a member of the Citizen's Participation Committee of the recently created National Anticorruption System (SNA),

¹¹⁷ Interview, 6th February 2018.

¹¹⁸ Idem.

¹¹⁹ Interview, 9th February 2018.

who recommended policies, methodologies, and evaluation criteria for the latter and has been *Animal's* op-ed contributor since 2014. The reporters showed the lawyer their database and obtained feedback, which helped them make sense of what they had seen while visiting the companies on the ground, and of the wider use of “ghost companies” and simulated invoicing in criminal activities – such as tax fraud, money laundering, embezzlement, organised crime, etc. That is to say, they discussed instances of the “immutable and combinable mobile” they were constructing:

[Reporter 1:] like I tell you, we still were a little bit afraid about whether all of these months' work was worth it or not, whether we could make it watertight or not... And [the lawyer] opened our view a lot, in fact since then [they] told us “this is a criminal nexus, and this has to be prosecuted by PGR [the General Attorney's Office] under organised crime, because all of them are acting with full awareness of stealing the money” [...]. And [they] said that what needed to be fought back against weren't the ghost companies per se, but the firms dedicated to creating the ghost companies. So that gave us enormous confidence.¹²⁰

[Reporter 3:] [the lawyer] explained to us that the context of the ghost companies was not a recent thing, but that it started 15 years ago with the outsourcing firms and... [they] told us it was like a thousand-headed hydra, so if the counterattack was simply to put a company on a list, we could go on like this forever.¹²¹

However, if judging which companies to include or not under their categories of irregularities was risky, to accuse them of a criminal offence was beyond the reporters' jurisdiction, since, in their words, “we're no public attorneys to be able to decide what crime to charge them with [...] that's determined exclusively by the authorities, in this case it would have had to have been the PGR [Federal Attorney General]”.¹²² Thus, to be on the safe side, they interviewed a lawyer and former ASF official, who at the time worked in the Mexican Institute for Competition (IMCO), a think-tank focused on budgeting, transparency, and anticorruption policy and funded mainly by the Mexican Council of Business (CMN), the Hewlett Foundation, and USAID. By discussing concrete cases with this official, the reporters decided to use non-incriminatory terms in the final title of the piece: terms like fund “diversion” or “disappearance”, instead of “fraud” or “misappropriation”, which are defined as offences by the Penal Code.

In sum, in the final stage prior to publication, the contributions of all these “expert” sources went beyond quick quotes or soundbites – in fact, unconventionally, most of them were not even mentioned in the final piece, as we will examine in the sections below. Instead, for the reporters, their value consisted in building more nuanced ways of classifying a cluster of heterogeneous practices which, more often than not, are loosely packaged into the catch-all concept of

¹²⁰ Idem.

¹²¹ Interview, 6th February 2018.

¹²² Interview, 9th February 2018.

“corruption”. As a result, they were able to calibrate and assume risk from a more advantageous position:

what was useful with regards to the specialists was the accuracy of terms and the accuracy in our categories of irregularity, because we knew it was obviously a delicate matter, and we couldn’t attribute them adjectives or criminal offenses, only show the evidence and use the terms that could be applied to them.¹²³

5.8 ASF: BUILDING TRUST VIA THE “RAW MATERIALS OF NEWS”

Nevertheless, it is one thing to develop a concept, and another to get relevant others to use it and back it up. That’s to say, following Eyal: for a network of expertise to gain power and influence it is not enough to be able to “craft and package its concepts, its discourse, its modes of seeing, doing and judging”, but more importantly one needs to establish relations, arrangements, and mechanisms “so [its concepts] can be grafted onto what others are doing and thus link them to the network and elicit their cooperation” (2015:54–55).

Therefore, in the final month before the publishing date (4th September 2017), our reporters followed their standard practice of contacting the public entities and universities involved in the final piece to get their positions. In the meantime, to the reporters’ annoyance, *Animal’s* deputy director scheduled a final meeting with those solemn and circumspect ASF officials in a final attempt to corroborate the special assignment findings. In the words of one of the reporters:

[in] the penultimate meeting we had with the ASF people, I was like “what’s the bloody point, if they’re not telling us anything, they’re not even helping us”. I couldn’t see the point, to be honest [...]. I told [*Animal’s* deputy director] “we already had two previous meetings and they told us *nothing!*” I was like, why waste our time and theirs? But anyway. The big difference this time was that we brought the database, right? And so we said to [the auditor] “look, we’ve made this [the database]” and with that I swear, [their] attitude changed from the moment we opened our laptop and [they] saw the database.¹²⁴

First, let’s remember that, by law, the ASF was not allowed to share reserved information about ongoing investigations, and although other permitted forms of cooperation were available, in several interviews they refused even to share their practices, their clinical experience, or give the reporters advice on their lines of enquiry and interpretation of scenarios. The reporters’ initial and unsuccessful approach was pitched in terms of a collaboration and mutual benefit: “we told them, ‘look, we want to amplify the work of the ASF, we’re going to take your information as a baseline – of course that’s going to benefit you, for your work to be seen’, but no, that argument didn’t work”. However, this time the outcome was different. First, at this stage of the assignment, the reporters needed not information, not guidance, but cross-examination: “we wanted them to examine what we had done and give it their approval, you know? [...] It was like ‘we’ve done this,

¹²³ Interview, 9th February 2018.

¹²⁴ Idem.

now just tell us if it's right or not, where we have to go back and take another look, or where we need to tighten it up'. And just the fact that they did that was very important for us".¹²⁵

Second, note that the element that triggered the ASF official's change in attitude was the non-human, intangible object in the room: the database. In recent years the so-called material turn in journalism studies and the sociology of news (influenced by analytical frameworks from science and technology studies) has enabled researchers to pay attention not only to how objects of journalism are co-produced, disseminated, and experienced, but also how tangible and intangible objects and technologies have indeterminate and contingent agency of their own, playing a key role in the stability of relationships between news workers, audiences, sources, and other actors, such as the different types of "experts" we have studied so far. Moreover, building upon the notion of the "raw materials of news" (coined by Tuchman and revisited by Michael Schudson) Nikki Usher has recently studied how "hard things" like media buildings, B-rolls, or documents that "can be felt, touched, seen, and visibly destroyed", as well as digital "soft things" like apps, code, or databases, can make a difference in cultivating trust, and in fact have a differential power to "communicate trust and be trusted" (2018:569, 573). In the following vignettes I explore how the Estafa reporters gained the cooperation and trust of the auditors and to what extent the database, as a "raw material of news", and the gesture of sharing it, played a role in this change of behaviour.

Let's return to the atmosphere of the meeting, because after three or four similarly arid interviews, the auditors too showed little interest in meeting yet again. As one reporter recounted, the auditor's initial body language was "when we shook hands they were like 'you again?', but when we started showing them the database, their eyes were literally as wide as saucers: 'how much time did it take you to do this?' – well, all these last months, since the first time we contacted you. 'And you did all this, how did you get this far? How many people worked on this?... Really, only three?!'"

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First, notice the theatrical dimension of the reveal: that moment when the laptop was opened and, in looking inside, the auditor's face was transformed with amazement, their curiosity triggered as to how the database, this digital "soft thing" of journalism, was actually created. The materiality of being able to show the database – as Usher suggests, being able to click on, scroll down, read a row or a column, etc. – gave the reporters a unique rhetorical advantage, similar to what Latour has described for other types of inscriptions:

¹²⁵ Idem.

¹²⁶ Idem.

“you doubt of what I say? I’ll show you”. And, without moving more than a few inches, I unfold in front of your eyes figures, diagrams, plates, texts, silhouettes, and then and there present things that are far away and with which some sort of two-way connection has now been established. (1986:14)

As most researchers studying journalists know, reporters guard their sources’ identities fiercely, so I was not able to contact the exact auditors who attended the meeting, though I did talk to other ASF auditors. However, I want to leave open some possible readings of how these interactions helped reduce their risk and uncertainty. First, auditors are bureaucrats whose job, let’s not forget, is to look meticulously and thoroughly into piles and gigabytes of relevant (and potentially irrelevant) files and records. In this respect, the database had qualities that no individual annual ASF report or forensic audit had, making it a valuable resource. As one reporter recalled, “what [the auditor] saw there was something that they hadn’t done, which was to join the dots and draw a conclusion”¹²⁷ Second, it may have also been a case of what Usher calls “showing work”: that is to say, the act of displaying how work was done and giving a “better sense of why the news work has been constructed in a certain way” (2018:571–72). This reverse “black boxing” might have had a double effect: 1) making visible the amount of effort and knowledge necessary to reach that level of detail; and 2) conveying a gesture of “showing one’s hand”, which contrasted very much with the poker-faced attitude, executive overviews, and succinct questionnaires used by the reporters in their communications with other government officials, like the ones involved in the suspect contracts.

Let’s not forget that a bad move while collaborating with journalists could constitute grounds for dismissal, hence the high risk associated with such an affair for ASF auditors, and the need for clear indications that the journalists would not take advantage of them, or bluff. Thus, a third element to take into consideration is the insistence and consistency of the reporter’s call for cooperation over a period of months. In this sense, the database “was no longer just the promise of ‘we’re going to do something’, but rather ‘we’ve already done it’”, which, together with the time invested and the openness to gaining feedback and an examination not only of the findings (*amarrar datos*), but of the device itself and the assumptions it was based on (*regresar pasos*), contributed to communicating a value and intentionality that was worthy of trust for the auditors. The reporters felt the change in the room: “what I saw in their attitude was ‘we ought to do this’ or ‘I would’ve liked to have done this’ as well. So, I think that was what finally made them respect us, I reckon that was what made them take us seriously”.¹²⁸

¹²⁷ Idem.

¹²⁸ Idem.

5.9 THE UNEXPECTED INTERVIEW

After that meeting, the ASF auditors' actions and attitude visibly changed. Days before the publication date, the reporters asked again for a final on-the-record interview to film the official position of the Auditor Superior, Juan Manuel Portal, on their findings. The ASF eagerly accepted the request, which for the reporters was a sign that "Portal was already aware of what we had done, and he knew perfectly well what he wanted to tell us", but they never expected to get much from the interview: "we expected it to be boring, the usual dull stuff".¹²⁹ Nothing could be further from the truth, for after closely examining the findings and documents, the Auditor Superior looked into the camera with a severe expression, his brow creased, and said gravely:

this a clear act of corruption [...]. Yes, it has the features of fraud, it's clear that this is a diversion of public funds [...] that's the *modus operandi*: the contracted services were neither delivered nor the goods received, there's such haste and sloppiness in the way the contracts were managed that it's practically impossible for them to have completed the contract assigned to them. This is a mechanism not only for the diversion, but for the disappearance of public money. First, we have to impose sanctions. Second, [the head of the public entity] has to be the one who signs off on it, so that they can be held responsible. You were responsible for that money, we trusted you with that money, that's why you were elected, and how did you take care of it? You failed.¹³⁰

In a way, by giving his words on the record, Auditor Portal staked his chips on La Estafa Maestra, which presented a huge boost of credibility and helped the reporters reduce their risk of mistakes and uncertainty. As one reporter recalled, "we never imagined, to be completely honest, that the Auditor was going to say all the things he said in the interview [...]. His phrases were devastating, categorical. When we left the building, we were jumping for joy [...] and of course that element gave punch [to the piece]".¹³¹ Like any quote or reference, indeed, his statement – one of the few published – was used as "compensatory legitimization" (Albæk 2011:338), but in a very particular and unconventional way. This time it was not a case of "going shopping" or "putting it in inverted commas if you don't understand it", but the last piece in a series of complex defensive work (*amarrar la nota*) and a conceptual journey to *gain understanding*. At this point in the chapter, I hope it is clear to the reader that this would not have been possible without going to the trouble of cultivating trust, of gaining respect and cooperation not through transactional favours or clientelism, but through the hard work of developing transcription devices, concepts, and forms of reasoning. This made the reporters' relationships with other experts less precarious, more symmetrical, and in turn, as we will see in the next section, enabled them to establish a chain of transcriptions with the ASF and the SAT. This strengthened not the reporters' professional

¹²⁹ Interview 6th February 2018.

¹³⁰ "La Estafa Maestra", 5th September 2017, *Animal Político*. <https://www.youtube.com/watch?v=tdk2ycTO5SE>

¹³¹ Interview 9th February 2018.

monopoly over the issue of the “ghost companies”, but the cooperation and expansion of the network of audit expertise.

5.10 THE DEATH AND RESURRECTION OF NEWS

When the reporting was almost over and the final texts began to be produced and edited, *Animal*'s director started contacting other media outlets, some of which had formed temporary alliances with *Animal* over past publications.¹³² The deal was to share the content of the investigation a few weeks before its publication date, so that the potential allies could decide if they wanted to join, and in exchange the allies would publish or follow up on the story with due credit to *Animal* and MCCI. More and more often, this trade-off between sharing one's scoop in exchange for access to broader and more diversified audiences has become a common dissemination strategy among small outlets, who unite their scarce resources to give their special assignments a better chance of coming to life in the public debate.

While the team of social media engagement editors, videographers, illustrators, information and web designers worked to communicate such a complex story in a simple and attractive way (the success of La Estafa Maestra's branding and visual identity cannot be explained fully without their contributions), anticipation was running high on social media. The weekend before Monday 4th September 2017, the evening when the story was finally published, *Animal*'s director had tweeted short teasers saying that the corruption of Governor Duarte – who a few months before had been captured hiding in Guatemala – was a “minor league” and “novice” affair compared to what their new investigation would reveal. Judging by the fact that the hashtag #LaEstafaMaestra became a trending topic on its first day, I was not the only one to find myself constantly refreshing the website until 8pm, when the story finally broke.

On each of the following two days, *Animal* and MCCI published one of the three parts of the investigation, focusing on the most important federal entities involved in the scheme: the Secretariat of Social Development (Sedesol) and Mexican Petroleum (Pemex). La Estafa, as a whole, produced varied reactions among public opinion. Overall, it was disseminated and covered by a constellation of non-mainstream local media outlets, mostly online platforms, as well as a handful of foreign outlets. On the launch days, La Estafa Maestra had three modes of dissemination apart from the social media strategy: 1) the above-mentioned temporary publishing alliances with *Buzzfeed México*, *Huffington Post México*, *Vice News Mexico*, *AJ+*, *El País*, and *Lado B*; 2) follow-up

¹³² See for example “Las empresas fantasma de Veracruz” or “Las promesas de Eruviel”, a fact-checking collaboration between five digital media outlets during local elections.

coverage in form of notes and articles mentioning La Estafa;¹³³ and 3) interviews with members of *Animal* and MCCI to discuss the piece.¹³⁴

In contrast, La Estafa went practically unnoticed in the mainstream or “traditional” national media outlets. The day after it was revealed, on Tuesday 5th September, the front pages of almost all of Mexico City’s newspapers ran two rather dull stories: one about Congress not having yet appointed a chairman, and another about three political parties registering a formal coalition for the next presidential elections in July 2018. Apart from a couple of interviews and mentions on late night discussion panels, La Estafa went unnoticed by prime-time national radio and open television programmes. The latter – owned mainly by Grupo Televisa and Televisión Azteca, the main multimedia groups which continue to dominate the highly concentrated broadcasting market in Mexico (OECD 2017) – are still the media par excellence for disseminating political information (INEGI and SEGOB 2012), with the highest penetration among the Mexican population (IFT 2016).

It is very hard to prove the intentionality of the mainstream media’s neglect towards La Estafa, especially since during the same period they gave special attention to Duarte’s case, another special assignment published by *Animal*. However, I would like to suggest that this could stem from a combination of possible reasons: from valid differences in editorial lines to media competition strategies, not to mention the potential conflict of interest involved in publishing a highly critical revelation about federal entities and top officials, when the federal government still held the unregulated and discretionary privilege of allocating public advertising funds (amounting to around \$2.7 billion USD in the past administration) (Article19 and Fundar 2018; Castaño 2017) and renovating or rescinding commercial broadcasting concessions.

Additionally, on social media some reporters, columnists, and directors – mainly, but not exclusively, from these mainstream media – minimised the journalistic merit of La Estafa Maestra, calling it a mere leak from the ASF or a simple compilation of ASF reports, as well as non-news or a “recycled” (*refrito*) version of old news published months earlier by competitors. As I have mentioned, the fact that similar discrediting and political spin occurred with other high-impact special assignments like the Panama Papers or La Casa Blanca illustrates not only the tensions and divisions within the journalistic trade in Mexico, but also how mainstream media conceive of the reporter’s work within their relations to politics. Not without a certain contempt, the conventional thinking is to assume that the reporter is a passive subordinate, a messenger or stenographer, who

¹³³ E.g. *El Diario de Yucatán*, *El Noroeste*, *La Jornada Maya*, *El Siglo de Torreón*, *Tercera Vía*, *El Debate*, *Zona Franca*, *UdeG TV*, *El Informador*, *SinEmbargo*, *Proceso*, *Aristegui Noticias*, *El Economista*, *Foro TV*, *CNN en Español*, *Univisión*, *Deutsche Welle en español*, *Reuters*, *Sopitas.com*.

¹³⁴ E.g. *Cultura Colectiva*, *Radio Fórmula*, *Financiero Bloomberg TV*, “Así las cosas” (*Wradio*), *New York Times en español*.

most likely just transcribed official statements (*gacetillas*) or leaked documents, dictated by a powerful political player with ulterior motives. In the words of a reporter with experience working in Veracruz, Mexico City, and abroad, whose special assignments have faced similar discrediting tactics:

it's very hard for people to believe that it was the journalist who did the work; the journalist who created the database, who discovered... because historically journalists in this country have been an instrument of the powerful and because there's a lot of copy-and-paste journalism. There are a lot of stories that have been leaked to me and I haven't followed them up, or after doing some reporting I decided that there was no story, and later you see them published somewhere else exactly as they were leaked to you. It's true that journalists have earned themselves a bad reputation, but it's also true that there's contempt for journalistic work from those in power, treating journalists like intellectually inferior beings.¹³⁵

Thus, the higher the stakes, the greater the need for journalists to develop effective forms of defensive work, which in turn entails a dilemma between – following Nikki Usher – “showing work” in order to display markers of credibility and the “behind-the-scenes” process and, at the same time, preventing these metatextual tropes from detracting too much attention from the actual story, or being perceived by colleagues to be showing off. In fact, during fieldwork I witnessed four instances of this last claim being levelled at La Estafa by critical and reputed reporters. Thus, the tension of the “showing work/showing off” dilemma is real and hard to solve, for it responds to one of the deep-rooted mantras of the trade: “the journalist shall never be the news” (*el periodista nunca es la nota*).

Despite this antagonism and the peripheral scale of the special assignment's dissemination, what is clear is that *Animal* and MCCI made a concerted effort to launch their *especial*, and invested their scarce resources in giving it an initial boost and the best chance of coming to life and reaching a broader audience, even at the expense of losing its exclusivity.

Yet, on the third day there was a violent earthquake in Southeast Mexico. The force of this fortuitous event – entire towns destroyed, hundreds of dispossessed, the urgency of rescue efforts – immediately became breaking news and set the media agenda for the next week, undoubtedly debilitating the impact of La Estafa as news. Moreover, the earthquake was used by top officials to put a spin on the allegations, as in the case of Rosario Robles, former head of Sedesol and then Secretary of Agrarian, Territory, and Urban Development (Sedatu), who stated:

we're in the middle of a tragedy, I'm going from house to house, we're visiting municipalities, spending hours each day walking – I think there will be another time to clarify this [...]. I have nothing to clarify for the simple reason that I did not sign any of those contracts. [...] I beg you to understand that we are going through a moment of emergency, of pain, of the desperation of hundreds of thousands of people. (Risco and Warkentin 2017)

¹³⁵ Interview 1st March 2018.

The following week, *Animal* and MCCI tried to reposition La Estafa in the public eye using a series of follow up news: 1) interviews demanding answers from the civil servants and deans of the universities involved; 2) fact-checking and contextualising all sorts of exculpatory or evasive claims, for instance, that it was a “problem inherited from past deans” and that “all allegations had been settled and clarified”, using the ASF’s online search engine, the Public System for Consulting Audits; and 3) interviews with lawyers specialising in tax and administrative law from the National Anticorruption System, like the lawyer whose cooperation during the reporting process was key. Contrary to the leadership shown by the former SAT team responsible for developing the SAT’s blacklist and for the swift investigation into the Duarte case, this time neither the SAT nor the Secretary of Public Service (SFP) publicly showed any signs of interest in pursuing the Estafa case any further. There was every sign that, like most registered criminal complaints in Mexico, this one would get stuck in the General Attorney’s (PGR) discretionary and infamously low prosecution rate.¹³⁶ Moreover, at this point there was no significant pressure coming from political opposition parties, either.

Despite all the efforts by our reporters and some critical media outlets to resuscitate the story within the public debate, little did they know that next Tuesday (19th September) at 1:14 pm the earth would tremble violently again, this time destroying parts of Mexico City and four other central states. This was by far the biggest news of the year, and it ended up burying La Estafa Maestra. How was it, then, that in less than a year this special assignment passed from being dead news to becoming a common language, shared by candidates, congress, the president, and practically all the mainstream media, to talk about corruption? Why did La Estafa Maestra resurrect itself?

5.11 CHAINS OF TRANSCRIPTION

Even the Estafa reporters, like almost all the journalists I know, understood that in the aftermath of the earthquake no news about ghost companies was a priority. It took them more than a month to resume their follow up of La Estafa, which started very timidly to be mentioned again in public opinion by the end of 2017. And, as I will argue in this section, the main reason why the investigation was rekindled as news was because at its core La Estafa succeeded in establishing, in Eyal’s words, “a circuit of dialogue and exchange” among different transcription devices from other key actors in a nascent network of auditing expertise.

¹³⁶ In Mexico, the probability that a crime will be reported, investigated, and solved is 1.14% (Zepeda Lecuona 2018)

Let me illustrate how the different statements and performances produced by these devices interacted with and reinforced each other. As we saw earlier, the eight categories of company irregularities (Figure 5.7) used in *La Estafa* were based on three main transcription devices: the SAT's blacklist (the "ghost" or "allegedly ghost" categories), the ASF's forensic audits ("ASF not found"), and the reporters' own fieldnotes ("dismantled according to reporting", "non-existent according to reporting", "without address"). In practice, this meant that at the time of its publication, *La Estafa Maestra* could detect and document irregularities among 128 of the 186 companies investigated – 68% of all contractors involving 180 million USD. However, at the time only 30 of these 128 irregular companies had been identified or confirmed either by the SAT or the ASF.

An interesting to-and-fro between these three nodes of the audit network followed the publication of the news. Despite the SAT's new director having closed down all communications with the *Estafa* reporters, on 18th September 2017 (one day before the second earthquake), nine more companies detected in *La Estafa* were officially included in the SAT's online blacklist of "allegedly ghost" companies. This fact passed almost unnoticed by the media until two months later, when the news cycle started to return to normal after the earthquakes, and *Animal's* reporters resumed their follow-up (mid-November). Again, on 22nd December, the SAT included another batch of "allegedly ghost" and "confirmed ghost" companies and, accordingly, *Animal* published news updating the magnitude of the Master Scam: not 68% but 80% of contractors had irregularities (an infograph from the report is shown in Figure 5.8), which at that point included not 180 but 270 million USD.

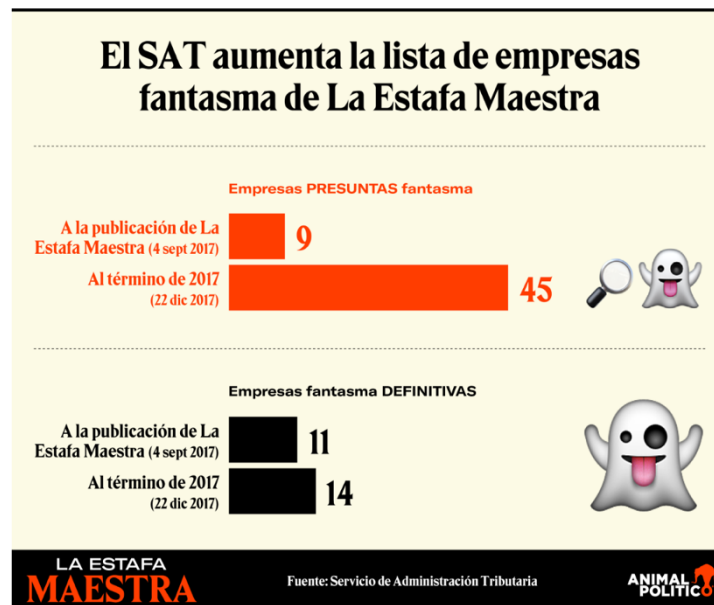


Figure 5.8: The SAT expands the list of ghost companies of La Estafa Maestra (Source: *Animal Político*, 2017)

Another of these circuits of dialogue and exchange took place one month later (26th January 2018), when the SAT blacklist included a particular company under the category “confirmed ghost” (*fantasma definitiva*): ESGER, the notorious “major suspect” which the original piece had cautiously included as a company “allegedly in order”, but which remained highly suspicious as it concentrated 36 million USD in transfers from 11 non-existent subcontractors. And now, seven years on from its creation, after five years of being reported by the ASF and four months of being publicly exposed by La Estafa Maestra, ESGER’s appearance of legality was officially debunked using the SAT transcription device.

A similar flow of information and circuit of reinforcement occurred between the ASF’s forensic audits and La Estafa following the September earthquakes. Since 2016, under the new Anticorruption National System legal framework, the ASF had a more practical schedule which entailed publishing three partial updates in June, October, and February, instead of waiting a whole year to present the Public Expenditure Review in Congress during the second month of every year. This meant that by the end of October 2017, a month or so after La Estafa was published and Auditor Portal gave the reporters that surprisingly forceful interview, a new cycle of audits – the main ASF transcription device – was released with new information about the recurrent irregularities of public entities and universities in the next budgetary year under review. The difference from every other year of ritualised “continuing news” about the ASF was, this time, a conceptual one. Now, the ASF audits were not only atomised documents with volumes and volumes of detailed individualised cases, but a credible input (one among others) that with every

cycle fed into a database on the *same system* of corruption: iterations of the same sophisticated scam. As one of *Animal*'s headlines captured succinctly in those days, the more the ASF's or SAT's devices kept producing, the more "La Estafa continues to grow" – *crece la Estafa* (Ángel 2017).

Thus, in mid-December *Animal* published a series of follow-up news on more irregular contracts reported by the ASF, which involved the Secretariat of Agriculture (SAGARPA), another university in the state of Durango and two more in Zacatecas. Two weeks later, in early January 2018, *Animal* used the ASF audit's public information to expand the scale of and political players involved in the same scheme: this time, auditors had found more irregularities in contracts between new universities – two more in Estado de México and one in Chiapas – and Sedesol, at a time when Rosario Robles and José Antonio Meade, respectively, were head of the Secretariat and the PRI's candidate-to-be for the presidential elections of July 2018.

This is when all the advice and master classes, all the cautious defensive work in their text, and the strength of the audit network that the reporters had cultivated with the ASF and other actors, proved crucial. For, on 11th January, Meade's legal team tweeted and sent a menacing public letter to *Animal* in which they denied all allegations; tried to discredit the news story by calling it "misinformation", "injurious", and "biased"; and, in an even riskier strategy, threatened to initiate a libel suit "against the news site that published the special assignment and against the latter's author", due to the fact that its content "goes far beyond the right to freedom of expression of the governed [*los gobernados*]" (Animal Político 2018).

Following McPherson (2018), the beginning of the presidential campaigns altered the "risk assemblages" experienced by journalists in Mexico. Because election time is also a season when political advertising and electoral coverage is negotiated, allocated, and monetised, this period introduced powerful political adversaries, aggressive social media bots, anti-press rhetoric from politicians, social polarisation, and high financial stakes for some media. In this context, having a "reflexive approach" towards risk and most importantly gaining the support and endorsement of allies in and outside the journalistic world, was key. First, there was an immediate public outcry from readers and from *Animal*'s media allies against Meade's threats, based on their attempted censorship of press freedom, and in the light of other scandals involving increasing illegal espionage and violence during the Peña Nieto administration. This eventually pushed the PRI's spokesman to retract the libel suit. Second, in its response to Meade's letter, *Animal*'s main argument and defence were to mobilise extensive quotes from the ASF's audits, which supported the claims and terminology published in their story. In the words of the director of *Animal Político*, "in summary, we believe the letter sent by José Antonio Meade's legal team should have been directed at the ASF. *Animal Político* merely reported that criminal allegations had been made, and what the audit said" (Animal Político 2018). For the PRI's presidential candidate to go after one digital media

outlet and one reporter is one thing; it is another thing entirely to go after the Auditor in-chief and thousands of civil servants in an independent federal body, appointed by Congress with a constitutional anticorruption mandate. In that sense, all the previous work towards linking the ASF findings to the Estafa database and eliciting the cooperation of auditors was a decisive endorsement for the reporters when trying to defuse or deflect threats. As one of them told me: “on this last affair with Meade... yes, the ASF reports were a great help, because they gave more support to the investigation [...] because of course it wasn’t just us, a bunch of political agitators, it was the Federal Superior Audit Office saying it!”¹³⁷

Without a doubt, the electoral context as well as the specific social, cultural, and economic resources available to *Animal* and MCCI played an important role in the resurrection of La Estafa as news. Of course, during the presidential campaign La Estafa was handy and attractive and indeed was picked up by relevant political actors: small political parties presented formal complaints against top officials involved in La Estafa; presidential candidates accused other candidates of conducting personal business with “ghost companies”; the then left-wing candidate and now President Andrés Manuel López Obrador promised in rallies that “there will be no more Estafas Maestras” and his campaign benefitted from this anticorruption narrative; and Secretary Rosario Robles was summoned by Congress for a hearing over her involvement in La Estafa. In that session, opposition senators gave Robles a copy of the Estafa book edition and displayed a big banner with political slogans using the exact font, colours, and visual branding used by *Animal* in the original publication. Of course, this time, all these performances, scandals, and accusations among politicians were being covered extensively by mainstream media.

Nevertheless, journalists were not the only ones experiencing a higher risk during the elections. I find it equally important to note that Meade’s lawyers also tried to discredit the ASF’s work. In the same letter, the serious irregularities reported by the ASF regarding Sedesol’s lack of material evidence to clarify whether the contracted goods and services were not simulated but actually delivered, were labelled as a mere “subjective appraisal by the auditor regarding the documents that he considers to validate the provision of services, which does not necessarily mean that these did not materialise”.¹³⁸

Moreover, four weeks later, the SAT’s blacklist was also challenged and put under serious pressure, for one of the companies included in the category of “confirmed ghosts” (*definitivas*) raised an unconstitutionality appeal to the Mexican Supreme Court (SCJN), which could potentially provide a legal precedent for eliminating the SAT’s list or reducing its auditing and publicity

¹³⁷ Interview 6th February 2018.

¹³⁸ Idem.

faculties. On this latter possibility, *Animal* published a piece quoting two expert sources (one from MCCI and another from the National Anticorruption Citizen Committee) who warned of a serious “setback”. In the end, the SCJN decided in favour of the constitutionality of the SAT’s blacklist and four months later a reform was passed to grant the companies in question possible review extensions for presenting proof of their operations, as well as more time to the SAT for analysing and determining whether these were simulated or indeed in order (Cámara de Diputados. 2018).

I find these examples revealing because they show the ubiquitous co-presence of “jurisdictional struggles [which] are waged not only between established professions but also between any groups that can lay a claim to expertise”, in such a way that *even* governmental auditing bodies with legal mandates, like the ASF and SAT, are also limited, dependent, and constantly challenged, and never cease to perform and compete publicly “by ‘professing’ their disinterest, skill and credibility” (Eyal 2013:869). Indeed, defensive and boundary work are in place all the time and are important factors (among others) in enabling or limiting the necessary arrangements for a network of expertise. However, as I argue in the theoretical chapter, this classic framework from the sociology of professions remains partial and falls short, for instance, of explaining why, even with all its high autonomy and the stability of a constitutionally defined jurisdiction, the ASF, the SAT, or lawyers from the SNA Citizen Committee would be interested in cooperating with or endorsing the expert labour and claims of competing professionals like journalists.

The answer is simple: because they need each other, because no single node of the network can realise the audit task fully without the contribution and cooperation of the other nodes. This is so, because they operate under different institutional arrangements, which, first of all, manifest the distinction between public and private. Following the golden rule of public and administrative law, the ASF and the SAT – like any civil service – are only allowed to do what is explicitly permitted by the law, whereas journalists, working under private law, can do anything that is not expressly prohibited by law. In practice, this means that actors have different powers and limitations. For instance: by law, the ASF auditors have incredible access to confidential information from all public and private entities that receive federal money, but they cannot prosecute specific civil servants, change legal loopholes, or freeze the bank accounts or deactivate the operations of a detected “ghost company”; by law, only the SAT’s due diligence could verify the latter, but their investigations could not go beyond taxes and companies. As private actors, journalists cannot legally access tax records or bank accounts to follow the money to its final destination, but crucially they can incorporate the political dimension of the cases, and join the dots between the administrative and fiscal jurisdictions.

In other words, before *La Estafa* was published it was not that the SAT and ASF lacked jurisdiction over the tasks of deciding whether a contractor and its services were real or not, or

detecting cases of corruption. In fact, with the 2016 Anticorruption reform, their legal mandates were even expanded. Nevertheless, year after year the ASF audit findings remained atomised and their recommendations, warnings, and complaints had passed unnoticed by the public eye. Not to mention that the SAT blacklist was incapable – as the ESGER case shows – of not only identifying and deactivating in time all the ghost companies from within a universe of 1.6 million,¹³⁹ but also of making a solid case and tracing the connections between them and the government (Ángel 2016b). My point is that by focusing only on competition over jurisdiction and autonomy, we are “leaving aside the question of what arrangements must be in place for the task to be accomplished and through what process these arrangements were created” (Eyal 2013:864). In this case each node of the audit network lacked the numbers and resources to detect and document by itself the existence, magnitude, and sophistication of the corruption networks.

Moreover, as journalistic production goes, *Animal* and MCCI did not discover or coin the idea, nor were they the first to follow the money of “ghost companies”. In fact, in the past five years or so there were equally notable news from other media outlets on how “ghost companies” had been used by other entities, from Pemex and offshore tax havens to the powerful Catholic congregation known as the Legionnaires of Christ, to mention just some examples. So, if we think only in terms of jurisdictional struggles, the *Estafa* journalists did not manage to exclude competitors or own exclusivity over the phenomenon of “ghost companies”. However, the database’s innovation and power can be read in terms of inclusion and cooperation, for they developed an “immutable and combinable mobile” of irregularities (Latour cited in Eyal 2013:872). In other words, *La Estafa*’s “concrete form of reasoning” was reproducible for other stories, and dynamic enough that even the initial companies, like ESGER, could change from one category to another. Therefore, by going to the unconventional trouble of gradually assembling a network of expertise “that links together objects, actors, techniques, devices, and institutional and spatial arrangements”, each node gained not only more resources and pairs of hands, but also a chain of transcription with “the ability to sum up the results of multiple [...] experiments [...] to make [its] claim for the efficacy of [its diagnosis and] therapy stronger” (Eyal 2013:864,886).

Basically, the dialogue and exchange between this chain of transcription works as follows:

- ASF samples the universe of auditable public expenditure, detects patterns of irregularities and risky areas of governmental performance, as well of visiting some companies in situ. It publishes these findings in reports every four months.

¹³⁹ Until 26th March 2019 the SAT’s list of confirmed ghost companies comprised less than eight thousand.

<ul style="list-style-type: none"> • La Estafa picks up one of those patterns, creates a sample of contracts and digs deep into all the companies and civil servants involved, visiting them in situ and finally summing up more companies, which were officially undetected but suspicious “according to reporting”.
<ul style="list-style-type: none"> • SAT picks up the list of undetected companies highlighted by La Estafa and starts investigating them, also conducting in situ diligences.
<ul style="list-style-type: none"> • SAT updates its online blacklist of “alleged”, “confirmed”, and “disproven” ghost companies on a quarterly basis.
<ul style="list-style-type: none"> • La Estafa picks up and (re)appropriates the SAT list and uses it as confirmation that their initial claims were correct. Moreover, with this information the Estafa list of companies is modified and updated by changing companies from one category of irregularities to another.
<ul style="list-style-type: none"> • Meanwhile auditors proceed to file administrative sanctions and criminal complaints at the Attorney General’s Office, after the official period for the entities involved to clarify ASF allegations.
<ul style="list-style-type: none"> • La Estafa publishes follow-up news on the ASF’s complaints, expanding and reinforcing the notion that multiple experts have concurred upon the signalling and red-flagging of the same system of corruption.
<ul style="list-style-type: none"> • With the updated version of the Estafa database, reporters can cross-reference other public lists of contractors and find new connections beyond the initial contracts.¹⁴⁰
<ul style="list-style-type: none"> • Four months go by and a new ASF report is published so the circuit starts again and the “dialogue and exchange” of the chain of transcription keeps rewiring the work of its <i>interdependent</i> nodes, expanding and strengthening them precisely because no single actor can monopolise the flow of information and attribution.

Thus, the network of audit expertise becomes stronger “not by restricting the supply of expertise but by extending it, so that [other] experts [can] borrow freely from its conceptual apparatus and draw on its methods to boost their own authority” (Eyal 2013:876). Contrary to other big journalistic revelations and scandals in Mexico, one year after the presidential election, La Estafa continued to grow.

¹⁴⁰ For instance, on 14th March 2018, another Animal correspondent detected that 16 “ghost companies” include in SAT’s list managed to register even in the highly scrutinized National Register of Suppliers of the National Electoral Institute, thus getting millions in contracts from local political parties in past elections (Aroche 2018).

5.12 MEANINGFUL GESTURES

As powerful and commanding as they may look bureaucratically, the SAT blacklist and ASF audits were incapable of detecting the whole universe of active ghost companies in time, and in all their years they had failed to generate the political momentum to have their recommendations and complaints enacted. That is why La Estafa Maestra played a key role as a central node in the network, establishing and articulating a complementary relationship between public and private institutional arrangements, between different spatial configurations, concepts, narratives, and devices. As Rosario Robles – former secretary of SEDESOL and SEDATU and currently the first member of a federal cabinet to be imprisoned under criminal charges in the modern history of Mexico – used to respond to allegations against her: “political responsibility does not appear in any criminal code”. Ironically, Robles’s alibi stresses the limitations of these professional boundaries. Of course, professional jurisdiction, autonomy, and available resources were necessary for each node to perform their investigations, but they were not enough or only half of the practice. As a senior ASF auditor recounts, political responsibility had to be found and discussed elsewhere, beyond the codes and mandates:

the thing with the ASF reports is that, even if it can be difficult to achieve sanctions, what was detected is made public, and you [the journalists] pick it up so that it resonates at a national level, and that’s what didn’t happen before, that’s a different kind of sanction, sometimes it’s a moral, social, or political sanction.¹⁴¹

Indeed, compared to smaller media outlets or those outside Mexico City, *Animal* and MCCI reporters originally had a relatively privileged starting point, for they worked in more horizontal newsrooms, had access to resources that are not equally distributed among the journalistic trade – such as contacts and support from their editor, access to expert sources, an existing reputation, additional funding, a multimedia team, dissemination allies, etc. Nonetheless, La Estafa’s contribution was not only a matter of visibility, communication skills, or dissemination; let’s not forget that in spite of all these resources and opportunities, La Estafa as news was initially dead.

My argument in this chapter is that for the next couple of years from September 2017, La Estafa Maestra was very much alive and continued to grow as news, to a large extent because it was able to *reconceptualise* ways of talking about and understanding corruption: from a mastermind to a master scam; from a diagnosis of isolated, individual wrongdoers to one of a sophisticated *system*, sustained by another network of public entities and private actors. In the words of Auditor Portal, “[it was] especially not just about making a lot of noise about what we found, or about flashy cases, but about identifying the causes and finding ways to cancel the possibility of that

¹⁴¹ Fieldnotes from CIDE workshop on investigative journalism, 9th December 2017.

[system] continuing to be replicated, at least at the magnitude at which it has been occurring” (Financiero Bloomberg 2017).

This was possible not because of La Estafa’s inherent technical superiority compared to other stories on “ghost companies”, nor because the journalists excluded all other experts and challengers, thus acquiring maximum autonomy and authority over the detection of corruption. On the contrary, it was possible precisely because a cooperative network of expertise was put in place, producing, reproducing, and linking interdependent expert work, in which no single node could monopolise the circuit of “exchange and dialogue”, and what one person could not achieve individually, others could do as a network. This was possible because the reporters managed to “devise new modes of action and discover the resources necessary to put them into practice” (Becker 1982:369).

Furthermore, this was not a case of journalists wanting to gain the professional authority and legal license and powers of auditors. In fact, time and again in public conferences and interviews, the Estafa reporters made it very clear that “we are not prosecutors” (*nosotros no somos ministerio público*). The same happened whenever Auditor Portal was asked if the ASF needed more legal powers to sanction and prosecute cases. His consistent answer was: “we do not need the power to bite, we are auditors, not prosecutors, we cannot be judge and jury” (Noticieros Televisa 2016). In fact, in the interviews I conducted, there was a sense of recognition, due credit, and collegiality between journalists and auditors, a sign of what Eyal calls “blurring the boundaries between jurisdiction [... as a tactic] to bound together the network of expertise” (Eyal 2013:893). Thus, as one reporter recounts, on the day that Auditor Portal gave that unexpected and decisive interview, “he even told us off-camera: ‘this is a work of auditors, which is to say, you could very well come and work here’”.¹⁴²

Again, a Latourian distinction between credit as reward and credit as credibility can be stressed here, in the sense that the symbolic relaxation of the professional boundaries and that off-camera gesture of including the reporters as legitimate working peers – paraprofessionals or co-auditors – is relevant “because each needs the other in order to increase his own production of credible information” (Latour 1987:202–3). It makes sense, because they need each other if they want to have a chance at completing the auditing task to its full magnitude and sophistication, while effectively calibrating the risk assemblages involved.

¹⁴² Interview, 9th February 2018. The SAT was more discreet in this respect, although in 2016 its director admitted in a couple of interviews that the official due diligence was triggered thanks to the publication of *Animal’s* pieces.

At this point in the chapter, I hope is clear to the reader that this would not have been possible without that first step of going to the trouble of cultivating trust, earning mutual respect, “being taken seriously”. This, of course, is not exclusive to special assignments, and can be achieved by different “performances of trustworthiness” in daily on-the-beat (*de la fuente*) reporting, but usually takes years of interaction with sources (McPherson 2012:2307–8). What this study shows is that cooperation between the Estafa network was not secured through what Claudio Lomnitz calls “asymmetric negative reciprocity” (2005) such as deception, intimidation, extortion, or coercion – typically associated with clientelist or *oficialista* relationships between journalists and powerful sources. This is evidence of a different relationship between the public and the private, a sort of complementary governance, where reciprocity was more balanced and symmetrical due to the hard work of not only developing an “immutable and combinable mobile” (such as the database and La Estafa’s conceptual apparatus), but assembling the arrangements necessary for the work of other nodes to borrow from and draw on La Estafa, and by doing so strengthen their own credibility. It was through “dialogue and exchange” of materials, through knowledge and practice that the journalists’ relationships with other experts became less precarious.

Furthermore, after La Estafa was originally published, our reporters had one more meeting with the ASF auditors, in which the latter were granted full access to the Estafa database. This was the reporters’ most valuable transcription device; it took them months of sweat and tears to devise and fill in, and (let’s not forget) was one of the few elements of the final piece that was not published under open access. Moreover, in that meeting the reporters taught the auditors how to *read* their database and understand the logic behind “its modes of seeing, doing, and judging, so they can be grafted onto what others are doing, thus linking them to the network” (Eyal 2013:876):

[Reporter 1:] what [the auditors] wanted was to check the template we had developed, because it could be useful for them in future projects, so they could also systematise their data. It was also a chance for them to see how we determined and systemised our analysis of each company, because we pretty much said to them, “look, if you follow this row, you can actually read what exactly is the triangulation within a single company”, so that’s how it could be useful for them.¹⁴³

My argument throughout this chapter has been that this meaningful gesture does not make sense in a world where extreme competition, boundary work, and territorial battles among professionals are the only game in town. In fact, notice how the reporters recall this situation in terms of gratitude, (co)working, and building trust through the raw material of news – for without the cooperation of auditors and fiscal experts, our reporters acknowledge that La Estafa would not have been the same:

¹⁴³ Idem.

[Reporter 3:] maybe that's why we were lucky, as well, because we gave them the database as a gesture, not of "OK, here it is, so now you give me something", but more to say "thanks to your work we could do our job, and in case it might be useful to you in the future, here's the database".¹⁴⁴

[Reporter 1:] We gave them [the database] afterwards in almost a mood of giving back some of that support, and it might not seem like much, but really the fact that they gave our investigation the go-ahead helped give us the assurance to publish it with as much punch as possible. In other words, the fact of us gaining their confidence, even though it was at the end, honestly the fact that they said to us "yes, that was the right track" was crucial. [...] So, it was kind of in that sense of gratitude, of saying "you see, we can work together without you breaking the law". [...] As I told you, we're not even asking them to bypass the law by giving us official documents, we just want them to share their *knowledge*. We're not auditors, and they know those lines of enquiry.¹⁴⁵

Therefore, acquiring background knowledge and clinical experience enabled the reporters to "understand" (*entender*), to inform their own questioning and gain enough confidence to the point of including their own expert statements/performances about suspicious irregularities as being "according to reporting". This entails a change from a risk-reducing to a risk-assuming practice; from the safety of covering one's back to reflexively calibrating risk not through editorialising, but through more complex and challenging reporting, in order to make one's piece watertight. In turn, this enabled the final piece to have an edge – higher stakes – to be published with as much risk as journalists deem possible (*salir con todo*), instead of seeking "the refuge" of "taking a pass' on the tougher calls" (Rosen 2009). This was the case not only for the original special assignment, but even for other simple daily stories that used the Estafa database, such as the follow-up pieces on the PRI's presidential candidate or the National Electoral Institute contractors. This, according to Patterson, suggests that "although speed is an obstacle to reflective reporting, it would be a mistake to see knowledge as a component only of slower-paced, longer-form reporting. In any reporting situation, the journalist who knows more about the subject at hand has an advantage over the journalist who knows less" (2013:106). I argue that detecting and catching all sorts of strange and evasive fish requires more than professionalised experts, whether knowledgeable super-reporters or highly autonomous but isolated audit officials; it requires the cooperative expertise of an army of "co-auditors". In other words, it takes a network to detect and fight another network.

This is not to argue that the network of audit expertise presupposes a place of extraordinary altruism: a space free of power, challengers, and reputation. Let me give a few examples. In 2017, Auditor Portal did not have the political support in Congress to renew his mandate for another term. As an experienced ASF auditor remembered in one of my interviews, what today might seem like an authoritative office had in fact, since its creation in 2001, always been challenged and continues to fight for its place and reputation in public opinion and in Congress:

¹⁴⁴ Interview, 6th February 2018 (my italics).

¹⁴⁵ Interview, 9th February 2018.

the truth is that during the first legislatures there was a very tense tit-for-tat between the ASF and the Chamber of Deputies. As time went by, the ASF – through its work, which from a technical point of view was fairly congruent, coherent, and consistent – started to generate an image that its findings had no political bias, which it has continued to consolidate. [...] Little by little the effect of generating technical, neutral information has allowed an institution that didn't exist 15 years ago to become very important today. For instance, as far as I can tell, [journalists] have some trust in the ASF auditor, and that to me is something to be valued, something that lessens somewhat my own frustration.¹⁴⁶

Additionally, as part of the Executive branch, the SAT's top officials are more susceptible than the auditors to being removed or reprimanded for the political consequences of their investigations, and so after 2016 its new directors closed all direct communications with the Estafa reporters. More interestingly, cooperation within the network does not mean accepting at face value the statements of all nodes. On the contrary, the fact that the centre of calculations used by auditors, tax officers, and reporters resemble each other in practice – for instance, they examine similar papers and perform in situ visits – has also been a mechanism for monitoring, holding each node's work accountable, and detecting any contradictions within the network's statements/performances. For instance, in July 2019, *Animal* published a critical special assignment on the contradictions displayed by the new ASF administration, headed by Auditor Colmenares, which suddenly cleared all the past observations and official complaints relating to the irregularities found in a 35 million USD contract, which the state government of Chiapas allocated to companies on the SAT's blacklist (Ureste 2019).

Furthermore, from the very start *Animal* and MCCI acknowledged the potential to expand the journalistic node beyond the handful of reporters in their newsrooms, and therefore designed the Estafa database to become a research service/tool that could be useful for other kinds of scams and to more journalists – particularly outside of Mexico City. Finally, as I have described above, this network of audit expertise is still a nascent one and it is a matter of historical contingency and patience to see whether it will be able to stabilise itself and expand by including other key nodes – like attorneys, other types of financial intelligence, or even whistleblowers and some of the accused. Yet, while administrations can come and go, the devices, concepts, and methodologies remain. One thing that the Estafa case shows is that, following Latour, “whenever we discover a stable social relation, it is the introduction of non-humans that accounts for this relative durability” (1990:111). In other words the Mexican network of audit expertise was, and will only be able to maintain the necessary “dialogue and exchange” by strengthening this interplay between practice, new conventions, and technology.

¹⁴⁶ Fieldnotes from CIDE workshop on investigative journalism, 9th December 2017.

6. CONCLUSION

For this dissertation I have spent the past years finding ways to denaturalise the subtle and, I must admit, incredibly cunning ways in which neoliberalism has used professional discourse in the journalistic world as an effective political tool and a means of producing epistemic blinders, which contribute to the legitimisation of media capitalism and, ironically, to the domination of journalists. As I argue in chapters 1 and 3, part of why it remains irremediably controversial and counterintuitive to think critically about professionalisation and professionalism after the neoliberal turn has to do with the latter's incredible labelling capacity to merge and confuse its rationale of individualism, privatisation, and depoliticisation with virtuous, civic, modernist, and competitive teloi.

This dissertation can be read as a twofold argument regarding the political and theoretical consequences of neoliberal professional discourse. In the first half, I reconstructed genealogically how the professionalisation of journalists has been weaponised politically as the one of the few forms of “light touch” (self-)regulation that are tolerable and compatible with neoliberal “free” market doctrine and Western values (Mansell 2010:177). I argued that the main political consequences of this neoliberal professionalisation (materialised in the form of “pro-democracy” lobbying, freedom of the press indicators and media development policy) are what we have stopped debating globally, what the Non-Aligned Movement (NAM) dared to question almost 50 years ago: the brutal concentration and abuses of media power, the neocoloniality and structural inequalities of global media systems, and the precarity and lack of protection of media workers. My hope is that by critically revisiting the NIIO-MacBride controversy, we – my participants and fellow scholars – might see and feel the aggressiveness, threats, and discrediting rhetoric with which the Talloires coalition silenced and stigmatised any mention of “the framework of public regulation underpinning a public service orientation” of the media (Curran and Seaton 2009, 338): from progressive taxation of the advertising industry, redistribution of media ownership and technologies, stricter compliance and transparency for media corporations, to public funds and subsidies, preferential tariffs and rates for non-commercial communication services and public media, not to mention strengthening unions, labour rights, and accountability obligations for journalists.

Since all this was made taboo, since (as I experienced first-hand in Mexico) not even journalists can nowadays talk about public regulation, taxation, subsidies, and unions in their own attempts at organising as a guild, I argue that we must bring the structural and the political back into the conversation. For this, historical sociology has proved insightful as a way of tracing not only the origins of neoliberal uses of professional discourse, but more importantly instances of

resistance, contestation, and counterhegemonic narratives, like the one articulated around the “new international information order”. In this sense, the critique and diagnosis offered by the NAM constitute a glimpse into a radical vision for the kind of media reform that is much needed nowadays. But it is also a different orientation, an upside-down world, an alternative knowledge horizon – especially for post-Cold War generations of practitioners and scholars like myself, who were raised and have lived our entire lives in a neoliberal world. For me, the NIIO is the high-water mark of that radicalism, whose existence is not only evidence of the place where the wave finally broke and rolled back, but a reminder that another world is indeed possible and that there could be alternative purposes and rationales to neoliberalism. One of the first steps towards repoliticising this debate consists of realising, following Becker, the subtle ways in which “control based on the manipulation of definitions and labels works more smoothly and costs less; [so that] superordinates prefer it”, but also understanding that, unlike nature, discursive traps are escapable, and can be challenged and problematised. This in itself constitutes a political positioning since “the attack on hierarchy begins with an attack on definitions, labels, and conventional conceptions” (Becker 1963:Kindle2969-2970).

By revising historical precedents and denaturalising neoliberal discourses, this thesis contributes to reinterpreting current Western narratives about the “crisis” of journalism and anxieties about its future (Alexander, Butler Breese, and Luengo 2016; Blumler 2010; Levy and Nielsen 2010). Using the Mexican case, I argue that the current imbalances and inequalities in the media, and accompanying exploitations of journalists are neither paradoxes nor unforeseen scenarios triggered by external factors, but a *direct result* of the triumph of doctrines predicated on the free flow of information and the free marketplace of ideas. Like any other critical revisionism, this of course entails a different periodisation of history and allocation of responsibility. If we think in terms of a “crisis” – an emergency that is by definition temporary and exceptional – then the origins of concerns about the state of journalism can be traced to circa 2008-12, to changes that were out of the control of the media industry and journalistic world: the global economic recession, the rise of the digital age, and the collapse of the “business model” for commercial media. Moreover, behind this notion of “crisis” lies a profoundly conservative assurance that with the right mitigating measures and extraordinary support (often directed towards entrepreneurship, innovation, human capital, and technology), sooner or later the crisis will pass, and things will be back to a long-desired normality – the good old days. What I have shown in chapter 3 is that the importance of what took place in the 1970s lies not in imagining what *could have been* if the NAM’s “new world order” prevailed over an individualistic and supposedly neutral laissez-faire policy, but in realising that this was in fact a struggle between *two* new world orders. Seen under this light, the present shortcomings of and disenchantment with the state of journalism respond not to

fortuitous, passing crises, but to the *expected* outcomes of the neoliberal order, and its long and continuous degradation of everything that is publicly and collectively oriented.

Regarding political responsibility, I purposefully name and show the positioning of the different types of members who conformed what I have called the Talloires coalition, because if there is one thing that characterises neoliberals it is their presentation of themselves as non-politicised or non-ideologised actors (see section 3.2.3) and their reluctance to be held accountable for the consequences of what they have so actively promoted. Here, political power intertwines with knowledge production, because the “McCarthy-like” offensive against the NIIO and the UNESCO was not only backed by the usual suspects – the Reagan and Thatcher administrations – but conceptually legitimised by the very same international think-tanks, foundations, media owner associations and academic institutions that nowadays hold a privileged position as “moral crusaders” (Becker 1963:Kindle 2201-2202) for press freedom. These are the primary setters of today’s benchmarks and ratings of professionalism, as well as the architects of the “crisis/future” of journalism narrative: from Freedom House indexes to Latin American media owners gathered around the Inter American Press Association (IAPA-SIP), and executives from the Big Four international news agencies, not to mention Ivy League scholars, among others.

Moreover, I argue that as researchers we must reexamine our positionality in and responsibility for reproducing and legitimising this neoliberal gaze and other forms of oppression in our theories. As a researcher from the Global South, I used my previous experience studying discourses of “enthusiasm and disenchantment” (Arteaga-Rojas 2012, 2014), as well as my journalists’ life-stories, and revisionist secondary sources (Escalante Gonzalbo 2005, 2018b; Freije 2019, 2020; Piccato 2017), as analytical leverage to critique and challenge the hegemony of the Mexican media “opening” or *apertura* model. I focus not on the intentionality of the authors, but on the causality and categories of their models, for “the act of categorizing is an act of theorizing” (Tuchman 1978:205). After careful examination of their data, I make the case that the *apertura* model adopts and reproduces the main elements of neoliberal professionalisation (depoliticisation, individual over structural, and private over public) and more importantly attributes underdevelopment to the anomic and “hybrid” nature and “cultural backwardness” of Latin American journalists, thereby falling into the recurrent trope of “blaming workers for the inefficiencies and conflicts whose sources lay elsewhere” (Burawoy 2009:54).

In the second half of the thesis, I explored the theoretical consequences of professional discourses. I make the case that the fetishism of professionalism and professionalisation in the neoliberal turn pastiches an older modernist paradigm of sociological theories, which saw in the study of professions and occupational groups an expression of the social division of labour and a potential source of moral order. On a par with other intermediary bodies like church, family, and

political parties, professions have been traditionally seen by sociologists as a moral milieu, where the trust, sense of belonging, and integrity of its members could underpin cohesion within increasingly dislocated industrial societies. I argue that by pursuing this, the sociology of professions has sacralised the strengthening of autonomy and jurisdictional authority of reputable professionals as something inherently desirable and an end in itself, thus creating epistemic blinders and methodological traps.

Under this paradigm, which has long dominated media studies and the sociology of news and journalism, professions are understood as a state of extreme competition among experts claiming control over a task or social problem – an analogy that prioritises tropes of market closure, monopoly, the separation of bounded spaces, and territoriality. Behind this logic of exclusion and insulation lies an idealisation of the emancipation of creative genius from external influences, which is in itself problematic. Most adherents of the paradigm conceive of “the ideal professional as a private practitioner in business for himself” (Becker 1970:95–96) creating special or esoteric work, which, in turn – as Raymonde Moulin has pointed out – is also conceived individualistically as “the unique product of the undivided labour of a unique creator” (cited in Becker 1982:360). In the case of journalism, I characterise this professional ideal subject as a “lone wolf”, an expression coined in the construction of the Watergate myth and the Anglo-American tradition of investigative journalism, which epitomises the aspiration of journalists to total professional autonomy through individualistic detachment and maximisation of authority.

Furthermore, I make the case that at the core of the sociology of professions there is a modernist, normative judgment which assumes autonomy and independence to be an ultimate goal – in other words, that the individual genius must be provided with much-desired creative *solitude* and appropriate circumstances to allow the creator to work independently without interference from the state or the market, but also without ties to lay society or other occupations. Nevertheless, following Becker’s analysis of cultural production, I argue that the problem with this individualistic and private reading of professionalism is that it systematically fails to see the collective dimensions and dynamic interdependence of journalistic practice. My findings are based on 53 formal semi-structured interviews with 39 participants (32 journalists and 7 experts) and 10 months of multisited ethnography in Mexico City (2017-2018) including participant observation in and outside MCCI, the *Animal Político* and *Proceso* newsrooms, Agenda de Periodistas meetings and Periodismo CIDE’s classes, diploma and research seminars (see Appendix 1). They show that even journalists in real life who have the opportunity and luxury to produce investigative “special assignments” cannot so easily comply with the professional “lone wolf” ideal because, in practice, reporting is a much more collective endeavour than we are led to believe, requiring not only independent and high-achieving professionals, but “the overt or tacit cooperation of many people and groups” (Becker

1963:Kindle2672). Moreover, based on the evidence I present here (chapters 4 and 5), I make the case that journalists disrupt professional boundaries and collaborate with competitors and outsiders not because of a new trend in extraordinary altruistic voluntarism, but because they need each other if they want to have a chance to complete the work in its full magnitude and sophistication, while effectively calibrating the risk assemblages involved in performing this task. This is particularly evident in contexts like Mexico, where, faced with new threats and higher risks, journalists are beginning to act and realising that sticking to professional particularism and “lone wolf” factionalism *gets in the way*, and that in order to survive, get the work done, and overcome their resented “loneliness”, their guild needs support from allies within and outside of the profession.

As the existing literature on the sociology of professions and media and journalism does not offer a framework for capturing the coexistence and interplay of competition and collaboration, nor the efforts and challenges involved in cooperation, I used the extended case method and Becker’s network analysis to devise an approach that was sensitive to the microinteractions and situations of reciprocity, collaboration, and interdependence that are involved in knowledge and cultural production. Echoing Gil Eyal, I suggest that in order to capture this collective dimension of journalism we need a paradigm shift from a sociology of professions to a sociology of networked expertise, to make sense not of “who has control over a task”, but of “what it takes to accomplish a task” and how journalists’ work “connect[s] together [or not] actors, devices, concepts and institutional and spatial arrangements” (2013:877). The significance of my data lies in making us aware of “anomalous” or counterintuitive winning-by-losing situations, where journalists can weaken their individual professional autonomy and at the same time connect their work to a broader network of expertise, which can be strengthened and extended precisely because no individual node holds the monopoly over a social task. My argument throughout the second half of the thesis is that the meaningful gestures of collaboration that I have analysed in the making of *Méxicoleaks*, the *Panama Papers*, and *La Estafa Maestra* do not make sense in a world where extreme competition, boundary work, and territorial battles among professionals is the only game in town.

Furthermore, there are scattered but fascinating ethnographic vignettes that indicate that this other half of journalistic practice – which responds to relations of reciprocity, cooperation, and collaboration – is much older and more ubiquitous than we tend to believe nowadays. In fact, this evidence suggests that the question we should be asking is not whether we are entering a “new era” or “revolution” (Stonbely 2017; Walker Guevara 2016) of radical sharing, but rather: when has everyday journalistic practice *not* relied on this collaborative and collective dimension? For instance, in his classic study *Journalists at Work*, Jeremy Tunstall recounts that as far back as late Victorian England, correspondents talked about all sorts of ad hoc cooperation, but also more

regular and widespread partnerships and “on going ‘group culture’” with “competitor-colleagues”: from the temporary “‘pooling’ of information between competing journalists [...] on a complex ‘beat’ with numerous sources” to coordinating a rota system between reporters from competing papers to take shorthand notes (due to the lack of recorders or typewriters), allowing them to keep up with big political speeches – not to mention the longstanding partnerships and friendships between competing correspondents sharing scoops and “exchanging the results of [their] efforts” by publishing them as they saw fit in different (often non-conflicting) national and regional newspapers (1971:218–19,230).

In more recent times, Gaye Tuchman has shown that reporters “relatively free from editorial supervision” in the New York City area in the 1970s “evolved a complex code that may contravene organizational dictates”, with collegiality, trust, and sociability playing a key role in the “mutual back scratching” and sharing of information with competitors, as well as in establishing the “sharp distinction between who is and is not admitted to the professional circle of sharing”, which had the benefit of “enhance[ing] one’s occupational mobility and the warmth with which one is greeted by new colleagues” (1978:74–75,77). A similar practice was documented in the 2000s in the Mexican context: Ella McPherson has described in detail how regular mid-morning coffee meetings were held by human rights reporters from rival newspapers – *El Universal*, *La Jornada* and *Milenio* – who casually exchanged “their views on the information gleaned from the press conference, as well as the angles each was going to take in writing it up” and when faced with an emergency they “divide[d] up attendance [of important press conferences] and swapped information at this coffee break”, behaving as “competitor-colleagues” (2010:48).

In other latitudes and media systems, Orayb Najjar (1996) has documented that for a period of time between the 1970s-80s Israeli and Palestinian journalists managed to establish collaborative and solidary networks (albeit not without emotional costs and risks for both sides), which enabled them to move “from enemies to colleagues”, resist censorship and anti-press attacks, and mutually benefit from each other’s linguistic fluency, access to sources, and local knowledge, even at times when nationalistic polarisation and communication between their leaders and people was almost impossible. Furthermore, Natalia Roudakova has shown that cooperation with lay society and outsiders to the profession was greatly valued by journalists in Soviet Russia. In fact, Soviet newspapers “serve[d] as collective organizers” of “various community activities” and “journalists took turns chairing clubs [open to readers and non-staffers], and commonly these meetings would turn into writing and reporting workshops, because Soviet journalists had also an obligation to make sure that at least half, if not more than half of the writing that appears on the newspaper, comes actually from people who are not journalists” (2017:75–76, 2019).

Even though this empirical constellation of collaborative accounts indicates, following Tunstall, that “co-operating is widespread, information is shared, advice is given freely, [and] the fruits of individual labor pooled” (1971:219), this is not to argue that exchange and collaboration are easy, spontaneous or equally experienced, nor that all reciprocity is positive.¹⁴⁷ However, if anything, this diversity of historical, material, organisational, and social configurations show that exchange and cooperation are delicate acts of navigation: always contingent, gradual, cultivated, negotiated. The point I am trying to make is that, sociologically, very little is known about the social relations and arrangements in which collaborative practices are embedded, although there is reason to believe that they happen all the time and are a constitutive part of everyday journalistic work. I suggest that this academic neglect responds to the epistemic blinders inherent to the binaries of professionalisation, precisely “because to study such problems calls attention to the disparity between symbol and reality” (Becker 1970:100–101). Moreover, professional discourse imposes a certain taboo, equating collaboration to collusion and treacherous collaborationism, which is difficult to reconcile for practitioners and, as Tunstall points out, makes this aspect of practice *sotto voce*, since “journalists think co-operation should be carried on in a fairly secretive manner [and] some disapproval by outsiders is to be expected” (1971:220). In this sense, this dissertation and its call for further systematic studies into the systems of support and mutual aid that have enabled workers to survive as a collective contributes to expanding conversations about the ways in which journalists might reexamine the politics and pathologies of professional discourse (as manifested in the precarious fragmentation and “loneliness” of Mexican independent reporters) and perhaps transcend professional categorisations.

Moreover, this thesis opens up new directions for future research. First, I am aware that focusing on what are arguably recognised as “best places” or “best practices” inevitably raises issues of methodology and data selection, which limit the claims that can be made based on this research. Indeed, social scientists tend to study successful cases, when in fact these are only a small part of the universe of practices and attempts. However, I hope it is clear that, contrary to the *apertura* scholarship (see section 3.4.3), which normatively assumes the “best” labels – like “quality”, “civic”, “professional”, “investigative” – to be descriptive labels, the whole purpose of this dissertation has been to problematise and think about them as reputational labels that are embedded in power relations. While acknowledging the limitations of the data collected here, I argue that for this critical, reputational approach towards professionalism, such a weakness can be seen as a strength

¹⁴⁷ Claudio Lomnitz (2005) has pointed out that even classical anthropological theories on exchange have ignored the distinction between cohesive relations based on gifts (*favores*) and positive reciprocity, and relations based on negative reciprocity such as threats (*amenazas*), extortion, and coercion.

because, in a way, “the best places” are ideal locales for identifying what counts as “professional(ised)”. Moreover, I have shown that these reputational labels are shaped by geopolitical macro forces, whereby the same hegemonic and normative assumptions work inversely – in negative terms – for “peripheral” contexts like that of Mexico. And so, following the disenchantment of the *apertura*, an inverse sampling bias has taken hold of scholarship on Mexican journalism, so that “worst practices” and “worst places” have now become the predominant sampling strategy of researchers. I have tried to overcome some of the shortcomings of a “best places” focus by denaturalising and upsetting the ideas behind this upside-down world, where “special” assignments are considered “deviant”, “anomalous” cases, amidst a continuity of captured and colluded *oficialismo*. Nevertheless, for future research, I agree with Becker that there is much to learn from the interstices of the “so-so, medium, nothing special” and that, following E. Hughes, “we need to give full and comparative attention to the not-yets, the didn’t-quite-make-its, the not quite respectable, the unremarked and the openly ‘anti’ goings-on in our society” (in Becker 1998:94). I have tried to capture some of this by studying my participants’ trajectories in the biographical interviews, which revealed the formation of and encounters with professionalism at earlier stages in their career.

Second, in each of the three main case studies of this dissertation – Méxicoleaks, the Panama Papers and La Estafa Maestra – the reconstructed expertise networks are articulated around journalistic nodes; in other words, the work of journalists has a central role in linking to other experts’ work. This, of course, is not generalisable to all networks of cultural and knowledge production. As Bottero and Crossley have pointed out, network properties like centrality, density, and brokerage have an “uneven distribution” and need to be studied in greater detail (2011:106). In Mexico, some of the most vibrant expertise networks, like the *buscadoras* movements for finding the disappeared, have articulated the expertise of forensic specialists, human rights activists, academics, and journalists. In such cases, the journalistic node occupies not a core but a peripheral position in the network; instead, the central position and brokerage of networks like these are held by relatives of the disappeared, in particular women (Schwartz-Marin and Cruz-Santiago 2018). I believe there is a great deal of sociological imagination to be unleashed by: 1) comparing the differences in relations and practices of journalists with other type of networks (a good start for the Mexican context could be the recent antiracist movements or longstanding environmental resistances, in which journalists have different positionalities and levels of cohesion); and 2) including the perspectives and experiences of more nodes in networks in which journalists are central, for instance by systematically interviewing actors who have participated in such situations, such as whistleblowers, civil servants, politicians, social movements activists, victims, and, of course, wrongdoers and perpetrators. This enterprise, while it surely would have been richer in

detail, was far too ambitious for a single ethnographer. The main limitations to me accomplishing this panoramic view in this dissertation were to do with access and the scarcity of time and resources. However, I tried to interview and include – albeit not in a systematic way – the accounts of other non-journalistic experts.

Finally, future research could only benefit from exploring not only the division of labour behind professional discourses – that is to say, how journalists “do things together” and can learn to trust and work with professional outsiders to produce knowledge – but also how cooperation and reciprocity is used for more pressing matters, like surviving, protecting themselves from violence, and finding ways of organising politically. As Luz del Carmen Sosa, a renowned and senior reporter from *El Diario de Juárez*, has pointed out, in violent contexts like the border states of Mexico, “the dead have no scoops”.¹⁴⁸ The expertise networks I have documented – nascent, precarious, and fragile as they are – do not have to deal to the same extent with the added inequalities and higher risks experienced in other regions outside Mexico City. There is evidence that one of the first actions implemented by organised crime has been to isolate local reporters in order to deal with them individually, dividing and eroding solidarity networks and occupational groups (Valdez Cárdenas 2016:17). In my fieldwork this violent source of division was not present, or at least not to the same extent, which calls for careful analysis, especially when making generalisations. If I make the case that the neoliberal professional discourse entails a “lone wolf” ideal subject, which can be found in other latitudes, this is not to say that all sources of division and fragmentation tactics in local and global journalistic communities are rooted in neoliberal “lone-wolf” behaviours; the role of violent and criminal actors in Mexico is proof of that. Moreover, comparative studies can be full of insights for exploring how these tactics of fragmentation operate around the world. For instance, as Ayala Panievsky has shown in the current Israeli context, anti-media populists like Benjamin Netanyahu have managed to “turn professional norms against” journalists by discursively weaponising the inherent binaries between professionals and lay society “to exclude journalists from the people”, “sowing distrust among news audiences while also encouraging self-censorship among journalists”, which journalists acquiesce to in the aims of preserving their image as objective professionals (Panievsky 2021:2137–39).

As an epilogue, I would like to close this dissertation by going back to the loneliness of the independent reporter, which for me was a north star throughout my fieldwork and writing process, and which I think could be equally useful in allowing Mexican journalists to open and continue an honest conversation about the issues they feel in their flesh and soul. As I pointed out in section

¹⁴⁸ Fieldnotes, 2nd April 2018.

4.2.1, what journalists in Mexico – especially those who consider themselves independent – resent the most is the fact that in decades of extreme anti-press violence, Mexican society has not taken to the streets in popular outrage, defended, or shown them the warmth of care (*arroparlos*) whenever one of their colleagues is killed or attacked. The common experience of my journalists is one of consternation and frustration because the protests organised by the guild are almost always attended not by rivers of ordinary people but by the same journalistic circle. Moreover, such protests are small, only fractional in comparison to other massive political demonstrations of social movements, which reporters are used to covering in their everyday work.

Throughout these years, I have kept thinking about my journalist's longing for society's indignation, company, and support, about how significant this gesture is for them as a source of legitimacy, especially in hard times. As I mentioned in the Introduction, the main goal of this thesis is not only to critique and denaturalise professionalism, but to help “articulate a politics of hope” (Fenton et al. 2020:chapter 4) and contribute alternative perspectives as a way out of the labyrinth of consternation and fatalism felt by my participants. So, where to look for inspiration? What might such a community and bonds between practitioners and society look like? Are there any instances in which Mexican society has cared for and defended the members of an occupation, and if so on what basis was this relationship established? After serious thought, I realised our best chance of answering these questions lies in revisiting Mexican history and moving beyond media-centrism and journalism studies. The way I see it, journalists in Mexico (and intellectual occupations in general, including of course academics) are in at a crossroad between two models characterised by schoolteachers (*los maestros*) and the military (*los militares*).

On the one hand, in Mexico's current militarisation we have a glimpse into the future: a taste of the professionalisation paradigm at its peak. Like few other occupations, the military in Mexico has articulated a very effective discourse of being a true and genuine profession: highly autonomous, disciplined, incorruptible, and patriotic. As a guild its reputation is built around the image of a dispassionate and detached execution – *sine ira et studio* – of their duties, where responsibility is transferred to the strict following of a particularistic military logic, clearly distinguished from civilian society, and established in detailed orders, codes, and protocols.¹⁴⁹ As Escalante has pointed out, a crucial part of the military professional-speak and ideal-subject lies in the public display of their patriotism, heroism, and sacrifice – of professing love and devotion to the homeland – and the normalisation of the metaphor that “the military are the people in uniform”

¹⁴⁹ It is no coincidence that in *Reforma's* inaugural speech, newspaper proprietor Alejandro Junco referred to the journalists under his chain of command as “an army for progress” formed by “soldiers of freedom” (Junco de la Vega 1993) – a motto I heard several times from former *Reforma* reporters.

(Escalante Gonzalbo 2021). Seen through the lens of professionalism, *los militares* are a success story. They are highly autonomous. They self-regulate and respond to their own special tribunals. And although there are still some checks and balances that compel the armed forces to answer to civil authorities at the top of the chain of command, the military constantly claim for themselves the monopoly over and prerogative to define what counts as “national security”, as patriotic, and in the nation’s interests. As most of my journalists know from their experiences reporting on the military, this professional discourse has proved a very effective defence mechanism for silencing public debate and criticism of their abuses of power and human right violations; blocking public information requests; preserving their opacity; preventing public accountability; and maintaining an image of unquestionable professional authority. Moreover, in recent years, the military have managed to staggeringly expand their jurisdiction to social tasks that have little to do with military logic: from increasing policing and prosecutionary functions to the management of ports and customs, the construction of airports and public infrastructure, not to mention the definition of science and technology goals, the implementation of migratory policy, social policy, and the distribution of gasoline and energy (Velázquez et al. 2021). Also, as a guild, in one century the military has managed to overcome its Revolutionary fragmentation and competition between individual caudillos-generals, and to unify (*cerrar filas*) and secure its wellbeing and privileges via a large and growing public budget, its own career system with secured salary, benefits, housing, health system, and a parallel education system for recruitment and training of its members.

Of course, the history of Mexican militarisation is a long process that exceeds the scope of this study, but the point I am making is that a considerable part of this macro social process is underpinned by a discourse of professionalism. *Los militares* embody a model that is the epitome of the teleology and pathologies of the professionalisation paradigm, of how occupations can do things right professionally, achieve their desired solitude and honour, and still end up alone, alienated from society. In other words: if professionalisation is the goal, be careful what you wish for. True, professional discourse can be a useful and powerful thing. That is why after almost decades of rampant violence and atrocities involving the military, it still holds a positive image of depoliticised efficiency and nationalism, which, after the neoliberal turn, has found resonance in the antipolitical and technocratic discourse of Mexican elites, and support from the last three administrations – from the left and right of the political spectrum. Despite this political effectiveness, I argue that we must be aware of the real-life consequences of reproducing such power. For instance, as we know from the Latin American experience, the consequences of the military believing “they are the people” and becoming exasperated with lay society have proven lethal. More importantly, professionalisation has consequences for the performance of social tasks. We now have evidence that the militarisation of security tasks (not to mention the other

socioeconomic tasks listed above) by empowering and deploying more professionalised soldiers has produced not peace, but more violence (Escalante Gonzalbo 2012).

However, this does not mean that sacralising professionalism from above is the only means of legitimacy for occupations, nor that the resented loneliness of excellent elites is the only way that practitioners can relate to society. Insights for an alternative model from below may be found in the schoolteachers (*los maestros*) of Oaxaca, especially in the events that led to the establishment of what was known as the Oaxaca Commune and the Popular Assembly of the Peoples of Oaxaca (APPO). In June 2006 the people of Oaxaca City did what my journalists long for: they took the streets, defended the schoolteachers, and literally fought and kicked out the state riot police, who had orders from the ignominious governor Ulises Ruiz to repress and dismantle the teachers' sit-in strike installed in the city centre. Faced with the governor's intransigency and increasing police violence, teachers along with popular, left-wing, and Indigenous organisations, human rights activists, neighbours, groups of women, and radical youngsters barricaded the city, expelled the formal authorities, and, for half a year(!), the APPO governed Oaxaca City and tried out one of the most vibrant laboratories of democracy, citizenship, and autonomous life in the recent history of Mexico (Bolos and Estrada Saavedra 2013).

The dramatic and sustained popular support towards *los maestros* was spontaneous but not fortuitous. Oaxacan society did not embrace the teachers' cause as their own overnight, nor did they express outrage, fight, and bleed in numerous protests¹⁵⁰ because Oaxacan teachers were award-winning and depoliticised professionals, outstandingly following quality protocols and achieving certifications according to international OECD excellency indicators.¹⁵¹ As Marco Estrada's remarkable ethnographic work has shown, these networks of solidarity between Oaxacan society and its teachers are the result of a long and deep-rooted tradition of checks and balances and grassroots participatory practices established 20 years ago by the Democratic Movement of the Education Workers of Oaxaca (MDTEO). The enduring internal democratic practices and assembly organisation within the Oaxacan branch of the teacher's union allowed the MDTEO to develop (albeit not without difficulties, setbacks, and contradictions) a true work of representation in its social and political sense. This was possible not because the Oaxacan teachers cultivated a detached "view from nowhere" or stuck to the professional boundaries of the classroom, but,

¹⁵⁰ From June to December 2006 between 20-23 people died as a result of the conflict and clashes with the police and paramilitary dead squads, and hundreds of protesters were wounded and imprisoned (Estrada Saavedra 2014b).

¹⁵¹ In fact, a key component of resistance to the latest national Education Reform has to do with the government's managerial and technocratic control over teachers through professionalisation indicators and productivity incentives imposed from above (Gil Antón 2018).

according to Estrada, because of “their enormous capacity to establish alliances with popular organizations, undertake protest mobilizations, exert political pressure and earn citizens’ sympathy for their cause” (2014a:137).¹⁵² Of course this unconventional professional practice does not come without a price, for *los maestros* are often stigmatised in public opinion as over-politicised, clientelist, captured, collaborationists, manipulated, and corrupt.

Finally, what was the relationship between the APPO and the journalists and Oaxacan media? In huge contrast, after only a month of protest and repeatedly denied requests to have some airtime and fair coverage from the mainstream media, the Oaxaca Commune – in particular groups of women – stormed, occupied, and repurposed the main commercial and university radio stations and local public television network. Together with community radios and movement media self-managed by the teachers (Radio Plantón), the APPO created its own radical and democratic local media system. For nearly six months, TV APPO, Radio Cacerola and Radio Universidad, led mostly by women, not only broadcasted news, direct action messages, and a counternarrative about the meaning of the APPO’s political protest, but more importantly opened their microphones and telephones to relegated voices of society¹⁵³ – not as sources or victims, but as co-producers of and active participants in public debate (Estrada Saavedra 2012). The expression of these voices (most of the time raw, unscripted and only lightly edited) galvanised a collective identity and an emotional bond amongst the Oaxaca Commune, which was key for creating what Bolos and Estrada (2013) call spaces of “autonomous public life” and “ruptures of the Oaxacan dominant order”. This radical reappropriation had consequences for the performance of news and communication as a social task. It disrupted hegemonic media logics and redefined journalistic – as well as linguistic and aesthetic – conventions of how a news show should look and be produced, and it established, at least for a brief period, a more symmetrical, reciprocal, and cooperative relationship between practitioners and society.

This is not to argue for a post-professional utopia or a world of journalism without journalists. In practice, the women and students in charge of the APPO’s movement media had to deal with a steep learning curve and the same gatekeeper dilemmas of negotiating the agenda of the day, and avoiding mistakes or spreading misinformation.¹⁵⁴ In fact, some local unionised media

¹⁵² My translation.

¹⁵³ Apart from a morning, afternoon, and evening news section, the content prioritised in the agenda was not “national” or electoral politics (2006 was a presidential election year) but education, agrarian, land, and water struggles, education, municipal conflicts and demands, culture, and traditional medicine.

¹⁵⁴ The local government implemented a media counterstrategy to sabotage the APPO’s equipment and mimic their broadcasting style, format, and open-mic sessions, by launching Radio Ciudadana, where “authentic” Oaxacans called in to support the repression of protest and spread racist, hateful, and false comments and information (Estrada Saavedra 2012).

workers and reporters helped and taught Oaxacan women how to operate the radio and TV stations; and a documentary house, Ojo de Agua, served as headquarters and workshop for gathering, editing, and uploading to the Internet the material that the APPO protesters-turned-reporters were covering in the streets. Does this mean independent journalists were absent, replaced, or redundant? No. What I am saying is that their work and specialisation was relevant for the people of Oaxaca as a relational paradigm and an alternative system of valuation: not for the competitive scoop, high-impact *denuncia* scandal, or investigative revelation, but to the extent that journalistic work could contribute and connect (or not) to a network of expertise and solidarity, where what is newsworthy, what counts as a revelation or journalistic success is not a professional peer prerogative, but a co-produced, deliberated, and consensual outcome. In other words, under a networked expertise paradigm, the role of professional journalists moves from the spotlight of the genius lone wolf to the gregarious interdependence and inclusivity of a collective organiser, a community-builder – a political being in the true sense, and part of a networked *gremio*. *La tumba del héroe es la cuna del pueblo*.¹⁵⁵

¹⁵⁵ “The hero’s tomb is the cradle of the people”.

APPENDICES

1. Data Overview
2. Interview guides
3. Participant Information Sheet and Informed Consent Form

APPENDIX 1. DATA OVERVIEW

- Fifty-three formal semi-structured interviews in total (those with signed consent forms) with 39 actors (32 journalists and seven experts). From the total of journalists interviewed, 20 were interviewed with both biographical and case-study approaches. On average, each session took between two and three hours. Also, 17 were considered senior staff, which means that they had more than 20 years of working experience as well as editorial and/or directorial positions. Fifteen were considered junior journalists as they had less than 20 years of working experience and little-to-no editorial/directorial experience. Gender-wise, 41% of interviewees were women. In terms of the regional diversity of participants, most of the interviewees worked in Mexico City, but their trajectories and provenance were broader and included place such as: Puebla, Michoacán, Veracruz, Quintana Roo, Guanajuato, Jalisco, Sinaloa, Chihuahua, Estado de México, Baja California Sur, as well as experience abroad in Spain and France. The complete interview list and some descriptors of the whole sample can be seen in the table below.
- Multisited ethnographic fieldnotes from participant observation in Mexico (July 2017 to end of April 2018, and two additional short trips in August 2018 and November 2019) were registered in seven notebooks and over 90 audio recordings of public events and meetings for journalists, as well as my participation in Periodismo CIDE's classes, diploma and research seminars (see list below).
- Open-source information. This includes continuous monitoring of social media interactions of the networks and interactions of my participants with the journalistic community, mainly on Twitter and Facebook, as well as through Whatsapp professional groups (only for background knowledge, no direct quotes from these message groups were used in the dissertation).

#	Position	Experience	Gender	Age range	Interview sessions	Residence/provenance
1	Editor	Senior journalist	Male	50-60	Biographical	CDMX
2	Editor-Reporter	Senior journalist	Female	50-60	Biographical + Case Study	CDMX
3	Editor-Reporter	Senior journalist	Male	50-60	Biographical + Case Study (in 1 session)	Puebla
4	Editor	Senior journalist	Male	50-60	Biographical + Case Study	CDMX
5	Editor-Director	Senior journalist	Female	50-60	Biographical	CDMX
6	Editor	Senior journalist	Female	40-50	Biographical + Case Study	CDMX
7	Editor	Senior journalist	Male	50-60	Biographical + Case Study	CDMX
8	Editor-Director	Senior journalist	Female	40-50	Biographical + Case Study (in 1 session)	Michoacán
9	Editor-Director	Senior journalist	Female	40-50	Biographical	CDMX
10	Editor-Reporter	Senior journalist	Male	50-60	Biographical	CDMX/Guanajuato
11	Editor-Reporter	Senior journalist	Male	50-60	Biographical	CDMX
12	Editor-Reporter	Senior journalist	Female	50-60	Biographical	CDMX/Jalisco
13	Reporter	Senior journalist	Male	50-60	Biographical	Michoacán
14	Reporter-Director	Senior journalist	Male	40-50	Biographical	Sinaloa
15	Editor-Reporter	Senior journalist	Female	40-50	Biographical	CDMX/Veracruz
16	Editor-Reporter	Senior journalist	Female	35-45	Biographical + Case Study	CDMX/Edo. México
17	Editor-Director	Senior journalist	Male	35-45	Biographical + Case Study (in 1 session)	CDMX
18	Reporter	Junior journalist	Male	35-45	Biographical + Case Study (in 1 session)	CDMX
19	Reporter	Junior journalist	Female	25-35	Biographical + Case Study	CDMX
20	Reporter	Junior journalist	Female	30-40	Biographical + Case Study	CDMX
21	Reporter	Junior journalist	Male	30-40	Biographical + Case Study (in 1 session)	CDMX
22	Reporter	Junior journalist	Female	30-40	Biographical + Case Study	CDMX/Veracruz
23	Reporter	Junior journalist	Male	30-40	Biographical + Case Study	CDMX/Spain
24	Reporter	Junior journalist	Male	30-40	Biographical + Case Study	CDMX/Spain
25	Reporter	Junior journalist	Male	25-35	Biographical + Case Study	CDMX/France
26	Reporter-Editor	Junior journalist	Female	35-45	Biographical + Case Study	Quintana Roo
27	Reporter	Junior journalist	Female	35-45	Biographical + Case Study	CDMX
28	Reporter	Junior journalist	Female	25-35	Biographical + Case Study	CDMX/Guanajuato
29	Reporter-Editor	Junior journalist	Male	35-45	Biographical	Baja California Sur/CDMX
30	Reporter-Editor	Junior journalist	Male	30-40	Biographical + Case Study (in 1 session)	CDMX
31	Reporter-Editor	Junior journalist	Male	30-40	Biographical	CDMX/Edo. México
32	Reporter-Editor	Junior journalist	Male	30-40	Biographical	CDMX/Edo. México
33	Due Diligence and Compliance	Expert	Male	30-40	Case Study	CDMX
34	Due Diligence and Compliance	Expert	Male	30-40	Case Study	CDMX
35	Information Designer and Programmer	Expert	Female	30-40	Case Study	CDMX
36	Lawyer. Human rights advocate	Expert	Male	40-50	Case Study	Chihuahua/El Paso, Tex.
37	Freedom of Press Advocate	Expert	Female	50-60	Case Study	CDMX
38	Media and journalism scholar	Expert	Male	40-50	Case Study	CDMX
39	Urbanist and academic	Expert	Male	30-40	Case Study	CDMX

Main Events Observed

Book presentation. *The Sorrows of Mexico: An Indictment of Their Country's Failings by Seven Exceptional Writers* (MacLehose Press)

Organizers: Centre of Latin American Studies, University of Cambridge

Location: Alison Richard Building, Sidgwick Site, Cambridge

Date: 25 May 2017

Relevance: Presentation by two senior Mexican journalists (co-authors) and commented by scholars. Observations during drinks reception.

CIJ Annual Summer Conference 2017

Organizers: The Centre for Investigative Journalism, Goldsmith University

Location: Stuart Hall building, London

Date: 22-24 June 2017

Relevance: Interdisciplinary workshops and closing keynote speaker by senior Mexican journalist.

International symposium “Modelos de Organizaciones de Periodistas”

Organizers: #Agenda de Periodistas/ Horizontal

Location: Fco. Sosa, Coyoacán. Mexico City

Date: 10 August 2017

Relevance: Invitation-only, all-day gathering of Mexican and Latin American senior journalists, freedom of expression NGOs and international founders. Observations during drinks reception.

Interdisciplinary Conference #DiálogosConnectas (1st edition Mexico). “La corrupción empresarial en México ¿Cómo nos afecta?”

Organizers: Connectas: Plataforma Periodística para las Américas

Location: Centro Horizontal, Mexico City.

Date: 24 August 2017

Relevance: Three Mexican journalists in dialogue with Undersecretary of State for the Civil Service (SFP) and the director of *Transparencia Mexicana*, chapter of *Transparency International*. Observations during drinks reception.

Public conference FIL Zócalo: “Encuentro de Periodistas #NoEstánSolos” and private meeting “Foro No estamos solos”

Organizers: XVII Feria Internacional del Libro. Mexico City’s Secretary of Culture.

Location: Zócalo, Mexico City

Date: 13-14 October 2017

Relevance: Closed-door gathering of freedom of expression activists and left-wing journalists from different regions of Mexico, where the convenience of joining the *Agenda de Periodistas* initiative and other protection measures were discussed.

6th Foro Latinoamericano de Medios Digitales y Periodismo

Organizers: Factual/Distintas Latitudes

Location: Centro Cultura España, Mexico City.

Date: 9–10 November 2017

Relevance: Interdisciplinary workshops and panels on digital media innovation. Observations during drinks reception.

Expert Panel “#MiLanaNoEsMordaza: el control judicial para la regulación de publicidad oficial”

Organizers: Red Rendición de Cuentas, Article 19, Fundar

Location: UNAM-Institute for Judicial Research (IIJ)

Date: 10 November 2017

Relevance: Lawyers, journalists and activists discussing political implications and scenarios of recent modifications to legislation for regulating government spending on public advertising.

Walter Reuter German Journalism Award Ceremony 2017

Organizers: Germany Embassy in Mexico City, Goethe Institut Mexico, Deutsche Welle, et al.

Location: Goethe Institut Mexico

Date: 23 November 2017

Relevance: Observations during drinks reception.

Book presentation “Duarte, el priista perfecto”

Organizers: Periodismo CIDE

Location: CIDE, Mexico City

Date: 21 February 2018

Relevance: Young reporter (author) discussed his award-winning investigation, now expanded and turned into a book. Comments by two academics and a senior editor.

Launch Event: Media Ownership Monitor Mexico “¿A quién le pertenecen los medios? La propiedad de los medios y la publicidad oficial: discriminación en contra de medios independientes y periodistas críticos”

Organizers: Centro Nacional de Comunicación Social (Cencos) and Reporters Without Borders (Chapter Mexico)

Location: Hotel NH Reforma, Mexico City

Date: 22 March 2018

Relevance: Journalists and activists discussed media ownership concentration and the discretionary and unregulated public spending on advertising. The governor of Chihuahua and one of the few major pro-regulation political figures, Javier Corral, attended and was heavily criticised by journalists in the room for the lack of results in the investigations of murdered journalists.

Book presentation “Romper el silencio: 22 gritos contra la censura”

Organizers: Periodismo CIDE

Location: CIDE, Mexico City

Date: 02 April 2018

Relevance: Five reporters discussed instances of anti-press violence and censorship. Comments by two academics specialising in violence.

Memorial “Natalicio de Javier Valdez: Malayerba a diez voces”

Organizers: Valdez’ family, friends and colleagues

Location: Casa Refugio Citlaltepec, Mexico City

Date: 14 April 2018

Relevance: Emotive memorial and reading of Valdez’s articles. Observations during drinks reception.

COLPIN 2019 Latin American Conference of Investigative Journalism (Mexico).

Organizers: Instituto Prensa y Sociedad (IPYS)

Location: INAI, Mexico City

Date: 7-9 November 2019

Relevance: Presentation of top Latin American investigations and multiple instances of networking.

APPENDIX 2. INTERVIEW GUIDES

BIOGRAPHICAL INTERVIEW GUIDE

Initial remarks

- Please take a moment to read the Participant Information Sheet and Informed Consent Form. Clarify doubts, further explaining if necessary.
- Choose level of anonymity.
- Agree on use of tape recorder?

Introduction

- “This first session is to talk about your trajectory as a journalist, the situations that have made a mark on you, that formed you, and your experiences in the different places you have worked before”

Education/training

- Let's start from the beginning, when and how did you start reporting?
- (For those whose initial training was not in journalism) How did you move from [occupation] to start doing journalism? Was your initial training helpful or not so much for your work as a reporter?
- Did your employer pay for your training?

Type of beats covered

- How was it covering that beat in those days?
- Was there a lot of competition amongst journalists on that beat?
- Were there instances of teamwork?
- Which were the assignments that marked your career at that stage?
- What were the major lessons from the most significant news production?

Workload

- Did you have a particular news quota?
- Was that daily?
- When and how did you make the change from daily reporter to special assignments?
- When you had the chance to work on the latter, what were the main differences?

Labour conditions

- How were you recruited in X media outlet or organisation? (Repeat for each time s/he moved jobs)
- What were your reasons for stopping working there? (Repeat for each time s/he moved jobs)
- (If working as a freelancer) How did things change when you started working as a freelancer?

- Did you get paid according to your working hours?
 - Was your contract or payment outsourced?
- Were social security, health insurance, and other benefits covered by your job?

Gender inequalities

- Is it tougher to be a female than a male reporter?
- Are you treated differently from your male colleagues?
 - What about sources, bosses?
- What about working hours, opportunities, promotions...?
- Do these differences affect your personal life?

Use of reporting tools

- How and when did you learn to use these tools?
 - Did you learn some of these things from other experts or non-journalistic actors?

Newsroom organisation

- Do you have the support of your bosses to work and/or collaborate on special assignments?
- (If working as a freelancer) What are the main pros and cons of your freelance work?

Different types of censorship and aggression

- In the places you have worked, were you ever censored, and if so, in what context?
 - What about other types of aggressions?

Other questions about career

- (If pertinent) Did awards have an impact on your daily work?
 - What about on your salary, contacts, or other practical advantages?
- Where do you see yourself in five years' time?
- Is there anything you want to add, or anything that you think is important to take into consideration?

EXTRA QUESTIONS FOR EDITORS

- How and when did you transition from reporting to editing?
 - How was it to have reporters working under you?
- Do you have the support of your bosses to work on special assignments?
- What types of funding have you used to finance special assignments?
 - Are they financially sustainable?
- Are these *especiales* well received by your audiences?
 - What means do you have to get in touch with audiences?

- Is there anything you want to add, or anything that you think is important to take into consideration?

CASE STUDY INTERVIEW GUIDE

Initial remarks

- Double check whether they have already signed the Consent form.

Introduction

- “In this second session I would like to focus on some of your recent work and talk about some practical aspects of the reporting process, in particular, the alliance with journalists from other media outlets, because since we were at school we know that teamwork sounds great, but can be tricky”

About the special assignment

- Let’s start from the beginning, how did you guys find out about the first leads for the case?
- What triggered the investigation? When was it that your bosses decided to make it an assignment?
- How did the reporting start?
- Did you focus full-time on this assignment, or did you have other workloads?
- Did you negotiate time and resources with editors for this assignment?
- How did you or your editors decide it was worthwhile to invest resources in these leads?
- How did you select those cases in particular?
- Were there any unexpected complications or challenges in accessing sources, public registries and other data?
- Delays and difficulties in accessing records and sources?
- Were there any dead ends in the investigation?

Teamwork

- Did you work alone or did someone else work with you at some point?
- How was the decision made to include people from other media outlets?
- How were the different tasks divided among the team?
 - Who did what?
 - How did collaboration take place between you?
- Did you meet regularly to discuss next steps?
- What types of things did you share?
- Was teamwork difficult at any point?
 - What were the main challenges?

- Did you travel together to do the fieldwork reporting?

Collaboration with other experts

- Apart from journalists, did people from other disciplines or areas of expertise participate at any point in the making of the assignment?
- Did you know them from before, how did you contact them?
 - How were your meetings and communications with them?
 - How did collaboration take place between you?
 - Who did what?
- What were their main contributions to the final outcome of the assignment?
- Were all these expert sources named in the final piece or were there some that remained anonymous or did not make it into the final version?
 - Anything else that did not make it to publication?
- How did you assess the credibility of leaks and these anonymous sources?
- Was it possible to verify or cross-reference their accounts?
- (If answered No) What were your reasons for trusting their accounts?
- Did you keep up a good relationship with them for future projects?

Publication strategy and public reactions

- Were there responses and confrontations with powerful actors (aggressions) before and/or after publication?
- (If Yes) Did you get any type of support after that happened?
- How was the decision made to share the scoop with your dissemination allies?
 - Were there any conditions or agreements with allies (like due credit, embargos)?
 - Were the agreements honoured?
 - How did you select and approach the media outlets or organisations?
- Where there any concerns about the consequences of publishing aspects (images, details, etc) of their stories?

Other questions

- If you had the chance to do it again, what would you do different or avoid doing?
- What did this assignment mean for you, personally?
- How did the assignment do with readers, viewers? How was it received?
- Have you worked again or kept in touch with any of the people involved in the assignment?

- Is there anything you want to add, or anything that you think is important to take into consideration?

EXTRA QUESTIONS FOR EDITORS

- What were the checkpoints when the decision was made to invest resources in this assignment?
 - What were the key editorial meetings like?
 - Were there any disagreements with reporters?
- What resources were available at the time?
 - How was the assignment funded?
- How did the team come together?
- When and how was the decision made to look for potential allies?
 - Under what terms was the collaboration negotiated and agreed upon?

APPENDIX 3. PARTICIPANT INFORMATION SHEET AND INFORMED CONSENT FORM (Translated from Spanish)



Department of Sociology
Free School Lane, Cambridge, CB2 3RQ

Project Title: Practices of investigative journalism in Mexico

Participant Information Sheet

Before you decide to take part in this study it is important for you to understand why the research is being done and what it entails for you. Please take time to read the following information carefully. The researcher can be contacted if there is anything that is not clear or if you would like more information. Take time to decide whether or not you wish to take part.

What is the purpose of this study? We are studying the practices and the conditions under which journalistic investigations are produced in Mexico. We want to observe, through the everyday experience and in the words of journalists themselves, the diversity of practices, styles, skills, and methodologies used by journalist when reporting. Our goal is to understand the common challenges faced by journalists in contemporary Mexico.

Who is organising the study? The study is organised by Rodrigo Arteaga Rojas as part of a PhD research project funded by the Department of Sociology, University of Cambridge.

Why have I been contacted? You have been asked to participate in this study because your journalistic work and experience meet our research criteria and can potentially shed light on the diversity of reporting practices in Mexico.

What will happen if I take part? The researcher will arrange an appointment for an interview and/or observation session at your convenience.

Will audio recording be used? Interviews and observation sessions may be audio-recorded with the prior agreement of the participant. At all times you will have the opportunity to request to turn off the recording device.

What are the possible benefits of taking part? This research programme is designed to explore how Mexican journalists practise and learn to investigate, and you are helping us to understand the challenges of this professional ability of journalism, which is vital for its democratic role. Apart from that there will be no direct benefits or monetary reimbursement from being involved in the study.

Confidentiality – who will have access to the information I give you? All the information you provide will be kept confidential and no personally identifiable data will be shared with any other third-party individuals or organisations. All data will be identified by a code and kept on password-protected computers.

We have adopted protocols for breaking the link between data and identifiable individuals by removing identifiers, using pseudonyms (you will be given the chance to choose your own if you wish), cataloguing files under encrypted titles, and securing any dataset containing personal information with strong passwords. All efforts will be made to strengthen our informatics security and to make our communications undecipherable and untraceable.

However, we want to inform you that despite these measures there is a potential risk that your identity may be deducible from contextual details in publications of the study. We acknowledge that your circumstances may change, so we wanted to let you know that at all times, prior to the publication of the study, you will be able to choose and discuss with Rodrigo your level of involvement.

What will happen to the study results? Results will be presented at academic conferences and in academic journals. The final results and analysis will be presented in the form of a PhD thesis. Parts of this interview or observation session may be quoted or referenced in future academic publications relating to this study, but no sensitive personal information (full name, contact details) will be included in such publications.

You also have the opportunity to receive a summary of the results of this study at the time of publication (estimated fall 2020), to see how you and others have contributed to this research project.

Ethical Review of the study: This project has received ethical approval from the Sociology Research Ethics Committee of the University of Cambridge.

You may withdraw from our study at any time up to the point of publication without explaining why. Should you wish to do so, please contact the researcher:

Contact address

Rodrigo Arteaga Rojas
Department of Sociology
University of Cambridge
Free School Lane, Cambridge UK, CB2 3RQ
Email: rda29@cam.ac.uk

Thank you for considering taking part in this study. If you require any further information, we will be pleased to help you in any way we can.

INFORMED CONSENT FORM**Title of Project:** Practices of investigative journalism in Mexico**Name of Researcher:** Rodrigo Arteaga Rojas

As part of this study, the researcher Rodrigo Arteaga Rojas will conduct interviews and observations, which means that you will be asked questions about the practicalities of your work and your involvement in the production of special assignments, as well as your ideas about journalistic investigations in Mexico. This research is being conducted as part of a PhD course in Sociology.

The interview will take about 60 minutes.

If you are interested in receiving further information about this project, please give Rodrigo your e-mail address.

**Please mark your initials
in the box if agreed**

1. I confirm that I have read and understood the Participant Information Sheet and have had the opportunity to ask questions and had them answered. ☐
2. I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason. ☐
3. I understand that the Rodrigo will make every effort to ensure that all personal information will remain confidential and that I cannot be identified (as far as the law permits), by using pseudonyms and breaking the link between data and identifiable individuals in the publication of this study.¹⁵⁶ ☐
4. I agree that data gathered in this study will be stored anonymously and securely, and may be used by Rodrigo in future academic research. ☐

¹⁵⁶ Data Protection Act 1998 (UK) and Ley Federal de Protección de Datos Personales en Posesión de Los Particulares 2010 (Mexico).

5. "I will allow interviews/observation sessions to be audio-recorded."

☐

"I will NOT allow interviews/observation sessions to be audio-recorded." (Please tick one).

☐

6. I agree to take part in the above project under the following conditions (Please tick one):

☐

___ Not anonymous

___ Anonymous for me, but not for my organisation

___ Anonymous for my organisation, but not for me

___ Anonymous for me and for my organisation

Name of Participant

Date

Signature

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