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Highlights

The Cult of Honor

Adaptation Strategies of South

Literacy Education on Farmer

Remedial Mathematics Performance

Discovering Thoughts, Inventing Future

VOLUME 17 ISSUE 1 VERSION 1.0

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Sociology & Culture

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# The Cult of Honor

By C. S. Herrman

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The cult of honor is, first of all, a ritualized expression of a social ideal, specifically of traits that can be termed 'honorable'. It very often arises either because persons or groups wish to experience pride in their cultural heritage or because they feel a calling to excel at culturally relevant activities.

This paper also advances the view that the concept of 'sportsmanship' mirrors what the cult stands for, and what public expectation both requires and demands. Characteristics of some thirty cults throughout three primary types of office are shown to reflect the concept.

*Keywords: honor, cult, office, ritual, sport, sportsmanship, game, dignity.*

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C. S. Herrman

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## I. Introduction

The cult of honor is a ritualized expression of a social ideal, specifically of traits that can be termed 'honorable'. We call it a cult not because a cult is necessarily good or bad, but because it is just what it is, a slice of the culture accordingly edited and stylized – ritualized. Active participation in a cult of honor presupposes prestige attaching to the unique and elevated quality of the cult's activities (through its offices). With special relevance to the cult, "prestige is construed as an ideology through which principles embedded in deep structure may be realized in action" (Riches, 1984, p.234). We can summarize these ideas applying criteria used by Romano (1960, p.974) in a related context: *The cult of honor "expresses the major outline of the community's…prestige system".*

Riches (op. cit, p.236) calls upon the assumption "that people who promote particular values…must also represent these values as relating to the (different) interests of the community at large. To this end, other broader ideas which the community holds as important must be cited and the values at issue must be referred to them." Prestige is what it is because the community has already valued its principles. Such is the case with the cult of honor. We summarize (Romano, ibid.): *The cult of honor "highlights those facets of community life which are of supreme importance in the lives of the [concerned] population."*

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The traits of honor participated in are sourced from within or without. It is typical of volunteerism, for example, to project desired ideals upon the field in which one wishes to make a difference. Most find the honor external to themselves and desire to identify with it through participation. The cult is an *office*. For these purposes an office is an expression of sincerity aimed at ideals that stewardship protects, and prerogatives that allow independent judgment in order to express the ideals at an appropriate level of quality and safety. Historian Norman Cantor(1991: 103) urged the office as Rome's greatest legacy to posterity. To summarize (Romano, ibid.): *The cult of honor "provides a basis for the analysis of the internal dynamics of everyday life in the community."*

By their nature, offices ritualize activities otherwise not performed through an office, accomplishing this in mainly two ways: 1) through oaths of office establishing heightened scrutiny of mis-steps and questionable conduct (compare the national anthem prior to sporting events and the heightened public scrutiny of unsportsmanlike conduct), and 2) iconizing material and human resources – that is, by enhancing, maximizing and generally valorizing methods and practices otherwise not available to activities performed in the absence of an office. As this description makes painfully obvious, it is not easy to reify the concepts of office and ritual in so many easy words. It all seems somehow amorphous or even nebulous.

Given the recondite nature of the cult, "what justification is there for saying they exist?" – asks Foster (1961, p.1175), speaking of his 'dyadic' relationships (also offices). Their reality is established because those participating in the cult know when the topic changes. The god-parent relation is perhaps the most oft-mentioned example of the type. The cult of honor is revealed in the efforts to assure a child of all the fruits his culture at its best may bestow, by the gracious assistance of one who appreciates the finer points of that culture. The 'compadre' will do right by the child that the child may do right by parents and compadre. Ceasing the relationship is a concrete fact to the participants.

We are today accustomed to 'mature' offices that are platforms for the exercise of granted authority. We don't call these relationships contractual but they do share a lot with contacts all the same. In terms of cultural history this is actually the most recent of three types –

1) ad hoc; that is, an office that materializes only upon select circumstances and lasts only as long as the exceptional circumstances do;
2) early civic; by which we include both appointive and elective. These were originally established to manage socially significant events or programs requiring those with circumspection and upright character, and
3) mature civic; a grant of authority, exercised by an officeholder on behalf of public utility. We often consider this to be the so-called 'modern' office yet is by our reckoning more on the order of ancient history. The idea behind this office is to allow for concentrated power to effectuate for society what otherwise could not have been accomplished.

The ad hoc offices feature persons or groups able to represent the social stake in honor; such offices come about from a momentary opportunity to put social ideals on display, or to exercise exemplary norms of honor in the occasional event requiring them (many effectuated in accordance with law or custom). All of the ad hoc activities, from dance to sport; from poetry to invocation, can be viewed as exercises collectively known as *ritual*. They all carry the subtext of prayer. Honigmann [1963, p.52], for example – "activities like dancing and [ritual] running also constitute praying." The reason: ritual is, like the office itself, quasi-public even when privately performed (see discussion section). Wherever a paramount source of honor and esteem grounds conduct, the ideals represented and pointed to presuppose the cult of honor. Of this office each participant in ritual holds a portion (a synecdoche) and thus shares in upholding the ideals identified through honor.

Ad hoc offices fulfill a mere barebones version of a full modern office (such as a profession). But these offices are ubiquitous throughout history and throughout the world, both early and modern. Thus chivalry was in full flush in Medieval times as a regularized discussion as to prowess, manliness and women. It was anything but an ad hoc office. We still today have chivalry, but now only as an office that has diminished in its fullness having lost much of the 'discussion' literature that kept alive the relationships between honor, prowess and love. If today the chivalry of old is more merely than opening a door for a woman or serving her first in formal dining, it is because there is less and less argument that men can be manly in treating women justly in all senses of the word. By winning a fair share of its battle, chivalry has lost much of its salience.

Early civic offices were treated as leadership positions and were offered as quasi-rewards for exemplary social service. That is, the office was still properly a service position but the reward of status always suggested the office as a position for which status was the payment and the unpaid office the means. As society got more and more complex, requiring many trustworthy people to engage their skills and honor on behalf of the community, early civic offices saw to the bureaucratization of society. These officeholders were initially appointed, then later subject to election under the well-known principle that "succession to rank position may be fixed; or it may be flexible and open to competition [i.e. elective]…" [Rosman and Rubel, 1972, p.659]). These offices often became institutionalized and a part of custom or law. The office giving rise to Greek ostracism became an example of 'public law' under Roman suzerainty, later becoming English (and then American) 'impeachment' procedure.

The mature office grew out of the bureaucratic, at least insofar as this writer perceives matters. In the end, we find the public represented by the leadership that grants the authority to offices on behalf of the public, where in the early bureaucratic phase they likely acted on their own as leaders. The office is an institution of which Whitehead (1961, p.54) remarked, "It is not yet understood in its full importance. Social philosophy has not grasped the relevant principles, so that even now each case is treated as a peculiar fact." It is less well understood than it might be that the mature office required forethought of the public interest.

***Ad hoc***
Exigency, Ethics, Art,
Sport, Elocution, Merit

***Early civic***
Occasional events
Recurrent events

***Mature civic***
Professional
Personal

*Fig.1:* The Offices

The reason for public concern over the evolution of the modern office concerns the immense concentration of power which did not as often obtain before. It counts as a reminder of the earliest small groups and bands in which leaders were allowed no actual 'power', only the respect owed their authority. The publics were fearful of strong personalities who could achieve a following and arrogate unwarranted power and influence.

In the cult of honor context, the 'professional' subclass of the mature office entails not merely identification with the ideals but being as well a vocational component of that very system.

At any rate, when we refer to a cult of honor as a celebration and emulation of social values on behalf of social forms, we are speaking of several types predicated upon stages of growth: we summarize them in Figure (1), above.

## II. Ad Hoc Rituals

What we wish to do is offer an overview of these early cults while observing parallels with modern equivalents.

*a) Elocution*

i. *Leadership*

On Tuesday, 18 September 2006, Gorge W. Bush delivered what amounted to an anti-extremism/terrorism, pro-democracy/freedom speech to the General Assembly of the United Nations. He was followed the next day by Iranian President Ahmadinejad, who offered his listeners an anti-injustice (aggression, occupation, etc.), pro-justice speech. I performed a content analysis of the speeches, categorizing selected words into positive and negative references in Table (1). My summaries of the results are quoted below in part (2010, pp.4-6):

The Iranian President's speech highlights the extent to which aspects of worth, value and ideal are wrapped about a single word, justice (f = 27). Bush also used that word, precisely once. … Practically every positive word of importance to Ahmadinejad"s message will strike the Westerner as broadly "spiritual". There was no mistaking the intent to portray himself the representative of a faith-abiding nation, in which virtually every act and consideration is suffused with the highest possible motivation. To the Westerner who follows the news with regularity, this inevitably smacks of bald-faced hypocrisy.

President Bush's remarks, by contrast, are heavily weighted to portray a man bent on securing world peace (f = 25). And precisely who, you can almost hear him asking, is going to disagree with that as a foreign policy objective? Of course there is a problem, for in this he opens himself up to charges of both cynicism and hypocrisy by those who see his policies as deliberately fomenting anger, discord, death and destruction. The remainder of his positive references point toward Western concepts of worth—which is to say, the political rather than the spiritual—democracy, elections, rights. On the negative side we observe the carbon copy of his rival, so that half of his words appear chosen to suggest motives of ill repute, and the rest directing us to the presumed consequences: extremism begetting terrorism, ideology begetting propaganda.

Borgström (1982, p.313) asks questions relevant to this exercise: "Analysis raises the problem of the connexion and similarity between politics and ritual. Allied with this is the question of under what circumstances speech can become an autonomous force that shapes the power structure beyond the control of the speaker." Bloch (1975) addresses these questions in ways we wish to modify. His 'ritual' presentation entails formalized language; his 'political' presentation confirms established social hierarchies. Rather than treat these as separate elements of which a choice is required, we find that the cult of honor necessarily incorporates *both* of these options. It must be stylized and so lose embellishing verbiage; it must also play to the understood prestige system and honor-related activities of society. Only thus can it become the ritualized cult. We agree that speaking from the ad hoc office and applying this mode of ritual can become that 'autonomous force' shaping opinion beyond the lecture forum.

*Table 1:* Frequencies of Select Words

Ahmadinejad's Speech | Bush's Speech

(Cont.= Contrast with the other speaker)

| Rank | Positive | Freq. | Cont. | Rank | Positive | Freq. | Cont. |
|---|---|---|---|---|---|---|---|
| 1 | Just/Justice | 27 | 1 | 1 | Peace/Peaceful | 25 | 13 |
| 2 | Peace/Peaceful | 13 | 25 | 2 | Freedom/Liberty | 21 | 1 |
| 2 | Love/Compassion | 13 | - - | 3 | Democracy/-atic | 13 | - - |
| 3 | God | 10 | 1 | 4 | Elections | 10 | - - |
| 4 | Respect | 9 | 4 | 5 | Moderates/-ation | 9 | - - |
| 5 | Dignity | 6 | 1 | 6 | Hope/-ful | 8 | - - |
| 6 | Almighty (the) | 5 | - - | 7 | Reform/-ers | 7 | 2 |
| 6 | Virtue | 5 | - - | 8 | Respect | 4 | 9 |
| 6 | Spirituality | 5 | - - | 9 | Rights | 3 | ? |
| 7 | Ethics | 4 | - - | 9 | Empower/Destiny | 3 | 3 |
| 8 | Perfect/-ion | 4 | 2 | 10 | Tolerance | 2 | - - |
| 8 | Righteous | 3 | - - | 11 | Independence | 1 | - - |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 8 | Truth | 3 | - - | 11 | Justice | 1 | 27 |
| 9 | Reform | 2 | 7 | 11 | Dignity | 1 | 6 |
| 10 | Free | 1 | 21 | 11 | God | 1 | 10 |
| | | | | | | | |
| Rank | Negative | Freq. | Cont. | Rank | Negative | Freq. | Cont. |
| 1 | Aggress'n/Transgr'n | 11 | 1 | 1 | Extremism/-ists | 16 | - - |
| 2 | Occupation | 10 | 2 | 1 | Terror/ism/-ists | 16 | - - |
| 3 | Oppressed/-ion | 8 | - - | 2 | Ideology | 2 | - - |
| 3 | Injustice | 8 | - - | 2 | Fear | 2 | - - |
| 4 | Threats | 3 | - - | 2 | Propaganda | 2 | - - |
| 5 | Domination | 2 | 1 | 2 | Oppression | 2 | 8 |
| 5 | Arrogate | 2 | - - | 2 | Corruption | 2 | 1 |
| 5 | Decadence | 2 | - - | 2 | Misery | 2 | - - |
| 5 | Coercion | 2 | - - | 3 | Domination | 1 | 2 |
| 6 | Disregard | 1 | -- | 3 | Contempt | 1 | - - |
| 6 | Usurpation | 1 | - - | 3 | Genocide | 1 | - - |
| 6 | Corruption | 1 | 2 | 3 | Brutal | 1 | - - |
| 6 | Exploitation | 1 | -- | 3 | Horrendous | 1 | - - |
| 6 | Imposition | 1 | - - | 3 | Unspeakable | 1 | - - |
| 6 | Interference | 1 | - - | 3 | Hatred | 1 | - - |
| 6 | Exclusion | 1 | - - | 3 | Desperate | 1 | - - |

By way of summary, each of our two leaders volunteered upon ad hoc offices in which for that occasion their responsibility was to summarize at the very height of literary ability the finer points of their respective cultures. Each spoke through participation in a cult of honor. Each felt his culture under attack by the other, thus reemphasizing the need to express the 'Sunday best' of their respective cultures. Each indirectly spoke to the opposite audience as a manner of assuaging inherently opposed notions of right and wrong, good and bad. It was a duel of contrasting cultural types, the honor-based (Iran) and dignity-based (U.S.).

ii. *Poetics and Bards*

Abu-Lughod (1986, p.233) asks, "Why do individuals in Bedouin society appear able to express through poetry the sentiments of weakness that violate the honor code and the sentiments of romantic love that violate the modesty code without incurring the opprobrium of the community or losing the self-esteem derived from embodying the moral ideals of their society?" Honor-based societies do not as a rule deny humanity, they simply establish what of humanity is fit for public consumption and what not.

Thus Abu-Lughod's answer to her own question (p.235): "Insofar as the poems through which these sentiments are revealed are private and confidential, they are like secrets: secrets function to exclude those who do not share them and to closely bind those who do. Thus, categories of equals gain cohesion and divisions between nonequals are intensified, reinforcing the structures of Bedouin society." Not only can ritual open the floodgates to cultural ideals, it can – from the collective purveyance – actually nudge culture further along its ideal paths.

Before the era of British inroads into India, royal bards held status (Snodgrass, 2004, p.277) "as arbitrators of disputes, witnesses to contracts and agreements, protectors of hostages, educators of kings and their offspring, composers of history, and indeed establishers of truth…." Such status presupposes their capacity "to make or break kingly reputations, to guard or besmirch kingly honour, and thus literally to forge royal identity" (ibid, p.274).

Today, the descendants of kingly bards, the Bhats of Rajasthan, "bards of former untouchables…still speak so persistently of kings and royal bard ship." In doing so they quest for the continued identity with a distant tradition no longer valued or honored apart from a historical artifact and reminder of cultural past glory. The ideals aback a given cult of honor need not be present tense realities; it is enough to entertain them in the mind with real ties to real history with real meaning to culture back in the day.

Reliving a cult of honor by retaining aspects of the bardic lifestyle and reminding others of their esteemed cultural history should surely count as a cult of honor in and of itself. It is no different than attempting to emulate the honor spoken of by the most famous bard of Western literature, Homer (see also below, §2.6.1.). These modern bards project their understanding of the past into the present, feeling satisfied to identify with values which they actively promote in order to revive for others the glories of a past but significant cultural reality.

*b) Art*

i. *Dance*

To this day in Greece dancing under certain circumstances activates an ad hoc office that in turn is tantamount to a cult of honor. It becomes what it is in part because of audience participation (representing cultural honor) as each dancer comes and leaves. While they are dancing the idea is to be unique in dance moves while meeting traditional requirements expected of the dancer. The audience urges it along and judges the performance critically. Cowan (1990: 135), herself of Greek ancestry, explains: "By presenting themselves and the [dance] they have organized as oriented…to the collective good, those in charge attempt to control the process as social ordering and to suppress 'illicit' manifestations of competition." The cult of honor as young men must envision it is tested and observed in their dance performances (see also Segal and Handler, 1989, pp.322-3).

Without the influence of public participation, dance is difficult to demonstrate (Pollenz, 1949) as the expression of an honor cult, combining as it does motions and vocalizations that are typically knowable only to native speakers. Often even anthropologists are helpless in the interpretation of these important events. It turns out, however, that in Hindi and Hawaiian cultures matters are far more satisfactory (Pollenz, 1948, p.654): "Hindu dancers are rigorously trained from childhood, and function almost as a separate caste. Hawaii, of all Polynesia, was the only possessor of schools for hula dancers, and was the only one to possess professional troupes."

What makes these dances special in themselves is the use of stylized hand gestures that permit one to 'read' the dance with accuracy, thus permitting an evaluation of the extent to which idealized traits consistent with an honor cult are in evidence – as doubtless they are given the special attention given to their training and cultural relevance. Demonstrating appreciation of these stereotyped productions keeps alive the undergirding values of a prestige system as if struggling to remain meaningful and vibrant.

ii. *Tea Ceremony*

The now quite famous author of The Book of Tea, Kakuzo Okakura, begins his essay (1989, pp.29-30) adopting some of our language. "Teaism," he says, "is a cult", where by 'cult' he means precisely as do we with the 'cult of honor'. He implies connoisseurship in allowing all tea aesthetes to be "aristocrats in taste". In essence, however, it "expresses conjointly with ethics and religion our whole point of view about man and nature. … Our peasants have learned to arrange flowers, our meanest labourer to offer his salutation to the rocks and waters" (ibid.).

Almost effortlessly we realize how and why the tea cult mirrors and identifies with the honor cult that is the Japanese aesthetic; for honor in this instance signifies the utmost respect to what has long earned the highest public esteem. Tea certainly meets the criteria. For a very different but not out of sorts approach, Kondo (1985, p.288) notes that, "First and foremost, the tea ceremony is a highly ritualized version of the host/guest interaction, and a heightened expression of the emphasis on etiquette in Japanese culture in general. It embodies the appreciation of formalized social interaction the importance, for example, of learning *tatemae*, the graces necessary to maintain harmonious social interaction. The theory is that mere good intentions are insufficient; one must know the proper form in order to express one's feelings of hospitality effectively."

iii. *Karate-do*

What follows below (Fantaousakis, 2010) are tied-together excerpts from a website devoted to karate.

If there is one man who could be credited with popularizing karate, it is Gichin Funakoshi. … One thing is certain: he found more honor in avoiding a fight than in starting one, and he believed there was more courage in fleeing a confrontation than in defeating an enemy. … It was that 'true spirit of karate' that Funakoshi spent his entire life trying to achieve. Mas Oyama, who later created kyoku shinkai karate, once trained under Funakoshi, but quit because Funakoshi's karate was 'too slow' and seemed more like a lesson in etiquette and discipline. But this was how Funakoshi wanted it. He taught that karate should not be used for self-defense – even as a last resort – because once karate was used, the conflict became a matter of life or death, and somebody was going to get injured. Funakoshi always remembered the proverb Soken Matsumura taught him: 'When two tigers fight, one is bound to be hurt. The other will be dead.'

This is nothing if not evidence of a stewarded office in which quality is maintained and scrutinized; where trustworthiness in the office by the public is maintained and protected; and where proactive measures are taken to avoid harm to others on account of the office. Hassell (1982, p.56) establishes the link to the cult of honor by centering the activity around Japanese culture: "What the Japanese call *true* karatedo arose from a culture whose every facet was in some measure a reflection of the philosophy of Zen. From architecture to flowers and food [including the tea ceremony], Japan's culture is a Zen culture, and karate do is a reflection of that culture." Participating in the martial arts from their more philosophical orientation allows identification with the honor these activities represent.

*c) Merit and Exigency*

Merit breeds power and influence, and is for this reason potentially dangerous in honor-based societies having few resources apart from public unanimity to counter such influence. In consequence, those of great merit and equally great esteem are by that very fact established in an ad hoc office in which their conduct is under surveillance for continuing deservedness of the honor in which the public is an interested stakeholder. Even today our famed sports and entertainment figures feel the impress of this mystical office. The principle involved is quite general; de Heusch (1997, p.213) explains:

Through a special ritual of enthronement, a particular person, whose political power varies enormously, in conferred with a unique property best understood by considering that the holder is transformed into a 'fetish-body'. These persons…may not in fact rule over any kingdom and their authority may simply consist of an enhanced moral status.

A part from merit, exigency also reflects fear, as when powerful individuals gain control of governance, as for example the Greek tyrants – often usurping their way into power. Here, also, they are presumed under examination for their conduct suitable to the honorable ideals of the community. Whether from merit or exigency, a failure to maintain correct observances of honor brought forth what the Greeks called 'ostracism': an exercise in public law where citizens decided whether the leader should be demoted and then banished for ten years. The Greeks took this stuff in deadly earnest.

The role served by these ad hoc offices, one for the leadership and the other for the citizenry, was to orient the gaze of leaders to the ideals of society which they should consider themselves duty-bound to uphold. They were put on notice that the cult of honor – as representing these ideals – was that against which their conduct would be measured.

During the age of tyrants ostracism was typically used to rid a community of its tyrant. But the evidence that the whole system revolved about (concerns over fitness to deserve any significant power and influence) comes from instances when merit alone was the source of office and ostracism. Such was the case with the most famous ostracism of all, that of Themistocles, the famed Athenian general responsible for the Greek victory over the Persians at Thermopylae. His failure rested upon defects that many traditional societies have dealt with in similar ways. In brief, Themistocles not only achieved envious power (even without being *the* leader) but was also increasingly arrogant and self-conceited, attributes that disqualify normals for respect and regard let alone those with the capacity to greatly harm society. Themistocles didn't have to do anything 'wrong'; he was not being punished per se, but through his evident failures in conduct the public restated its ideal of the cult of honor at his expense.

It is because this is no 'typical' office; because it becomes a ritualized affair owing to public involvement; because of continual scrutiny of conduct (such as we will occasionally require of famous sports figures) – all of these establish the office as a cult of honor, unasked for but required all the same, as with many instances of kingship and other variations on the theme of authority.

*d) Ethics*

*i. Bargaining*

Many highly regarded anthropologists have treated bargaining in traditional societies as low and mean-spirited and generally unsociable "because it is always conducted with varying degrees of cunning, guile, stealth, and sometimes violence" (Khuri, 1968, p.698). This ethnocentric approach, if factual, is of course unfortunate; the more realistic approach of Khuri (ibid.) tells us this:

Bargaining takes place…where prices fluctuate and where buyers and sellers meet with opposed economic interests. It brings order to such markets by enabling the buyer and the seller to develop lasting economic relationships between them, based on mutual trust. Should the bargaining…fail to establish such trust by the use of culturally determined polite formulas, conflict then arises.

Another reality is simply that the cunning and etc. so complained of are not so much complained of by the bargainers themselves; for these are more often than not quite acceptable and expected applications of honor in these circumstances. Honor despises weakness and dependency, and negotiations present a risk for exposing both, whence the added charms otherwise so disliked. In fact, the properly conducted bargain is the very expression of the honor cult as it relates to these exchanges.

"In bargaining, the social status of the bargaining partners is at stake. They attempt to neutralize this status by following the strict rules of bargaining etiquette. But bargaining is not used only to neutralize positions, but also to improve them. If either party to the bargain, seller or buyer, is unusually successful in his approach, he earns social recognition among his group by developing the reputation of knowing how to 'handle' people and subsequently affect their choice behavior" (ibid, p.704-5).

Some will point to the fact that (ibid. p.700) "men of honor and prestige in the Middle East do not bargain, even when they realize that the goods they have bought have been overpriced. This is because bargaining, like penny-pinching, does not go with prestige." Such are a small portion of the population and thus do not reflect aspects of honor common to ordinary folk (who of necessity bargain). But the point, after all, is always the context – which need not be culture-wide and in fact rarely is. Thus the ideals of bargaining reflect the ideals of honor and etiquette *for the marketplace*.

Still, there are relationships to be drawn from bargaining into the broader culture. Whitehead saw it like this (1961, p.31): "They examined the theory of trade, and they construed its interactions in terms of competition, mitigated by 'higgling'." Fanslow (1990, p. 251) summarizes the issue for which bargaining is a partial solution: "In Geertz's terms, 'the man' who is passing on goods in return for money is far more certain of what he receives, then 'the man' who is passing on money in return for goods." But this asymmetry of information is a problem in the very nature of the office, any office whatever.

The client in an office is in 'adverse reliance': he is at an inherent disadvantage and must rely on the better scruples of the officeholder to prevent adverse consequences. At least in the marketplace, bargaining resolves some or much of this issue. One can at the very least drive the best bargain that cunning may devise. (For an approach based more on power options than adequacy of information, see Alexander and Alexander, 1991.)

ii. *Samaritanism*

By 'Samaritan' is meant the person voluntarily creating an ad hoc office for the purpose of rescuing a stranger from a difficult entanglement or accident. It is expected that such assistance may entail a risk and/or expense (the latter, if significant, can reasonably be requested from the subject/victim – who also joins the office – failing which a court may intervene, but see below). This distinguishes the Samaritan from the volunteer who we will consider offers herself short of generating risk to self or other as a cost of assistance (which will not exclude, however, risk on behalf of a close friend or family member, and will not presume recovery of expense incurred).

Like volunteerism (below, § 4.2.2.), Samaritanism is presumed to include itself as part of a projected reality of idealized values able to be realized if enough were to become 'good Samaritans'. Not every concerned institution is as sanguine (Dagan, 1999, p.1154): "In most cases, good samaritans are described by the courts as 'mere' strangers, volunteers, officious meddlers, intermeddlers, or interlopers. Needless to say, use of these derogatory epithets usually indicates that the plaintiff's claim is doomed to fail."

The participation in service is at the same time participation in a cult of honor provided a rationale is met for considering the situation as a risk to honorable ideals and/or the example set by assistance would if followed improve or extend the existing system of honor at issue (thus in Table 4 this example is shown as both internally and externally provenanced).

e) *Sport*

i. *Archaic – Chariot Race (and Olympics)*

We can learn more by focusing on the sports aspect. In Homer we have the example par excellence of a cult of honor. It is expressed in dialogues between heroes and gods, the former able to exercise the lesser or greater instincts of mankind, the latter who offer judgments upon these characteristics. Sport occupies a very important niche in communicating the ideals of the cult of honor. Here is a representative example from Homer, *The Iliad* 23.256-24.6:

"Antilochos, you used to play fair, but what you have done now? You have besmirched my *arête*, you fouled my horses by throwing your own in front of them, even though yours are inferior. … Come here, Zeus-natured Antilochos, and do what is right. Stand in front of your horses and chariot…and swear by Poseidon the Earth holder and Earth shaker that you did not foul up my chariot with a dirty trick."

Then Antilochos, once more the sportsman, answered him: "Enough now. I am much younger than you, lord Menelaos, and you are my elder and better. You know how greedy transgressions sprout up in a young man, for his mind races on, but his judgment is lightweight. Please be patient with me. I will give you the mare which I won.

He spoke, and led up the mare and gave her to Menelaos whose anger softened. He said: "Antilochos, although I was angry I will now give way to you, since you were not flighty or lightheaded before now. Your youth got the better of your brain. You will not play tricks on your betters another time."

Euripides, who wrote plays critical of the reigning aristocracy, was not opposed to the cult of honor but felt that these cultural leaders had failed to live up to expectations. Thus he asks (*Autolykos*, fragment 282, in Miller, 1979, p.96), "What man has ever defended the city of his fathers by winning a crown for wrestling well or running fast or throwing a discus far or planting an uppercut on the jaw of an opponent? … We ought rather to crown the good men and the wise men, and the reasonable man who leads the city-state well and the man who is just, and the man who leads us by his words to avoid evil deeds and battles and civil strife."

Euripides is replacing the role of the gods with moral reporters who establish the cult of honor in the context of a democratically oriented moiety. Had sport still carried the imprimatur of respected mythology (delivered by gods and heroes) Euripides would have complained far less. He seems to suggest that the aristocracy had come to rely more on the pragmatic than the honorable. Aristotle was able to comment in similar terms (Politics, 1338 a): "It is clear therefore that there is a form of education in which boys should be trained not because it is useful or necessary but as being liberal and noble…."

All of this seems to apply more to 'sportsmanship' than to 'gamesmanship' (typically a pejorative), which highlights the need to critically distinguish between 'sport' and 'game'. This is more of a chore than it may seem at first glance for there are other words and many concepts interlarded with the idea of 'sport'. Consider how we view the 'Olympic Games', versus their listing of over a hundred participating 'sports'. Does the Olympic Committee's use offer assistance in differentiating their meanings?

Section 1.1 of the Olympic Charter specifies the following: "The goal of the Olympic Movement is to contribute to building a peaceful and better world by educating youth through sport practiced in accordance with *Olympism and its values*" (my emphasis). The IOC (International Olympic Committee) is our new bard, the modern Homer, whence the cult of honor which is the Olympic Games *and* the intervening efforts on behalf of sports and sportsmanship.

ii. *Medieval – Chivalry*

We list this entry under 'sport' to draw out relationships consonant with those even more apparent (below, §2.5.3). "Geoffroi de Charny (c. 1306-1356) was the chivalric embodiment of his colorful and violent age. … [and] lived the vocation about which he wrote" (Kaeuper, 2005, p.1). What we ask for at this point is to see in his writing a sincere approach to the ideals of honor (or what passes for the respect and esteem emblematic of honor). We are in effect asking the author to be chivalrous about chivalry, the identification of ideals in full appreciation of their honor cult. Here is a fellow who 'talked the talk and walked the walk'.

His aphoristic presentation is easily categorized into thematic stretches: the ethics of prowess and deeds; the ethics and qualities of a man of worth; the relevance of religious devotion, and the honoring of women. Clearly these are reflections of actual ideals. Clearly he is proud of participating in them. Just as clearly, therefore, he is participating in a cult of honor. He is also, besides a man of his age, a man clear in the simplicity of his ethics: "And again I say: he who does best is most worthy." A citation will not be necessary: he ends every aphorism with the same refrain. He sees the best in those who act while acknowledging that errors in ethics or character will not necessarily be 'the best'.

iii. *Modern – Scouting and Bushido*

'Scoutcraft', a word used in the first Boy Scout Handbook, refers to the education in the practical arts of survival. But beyond the education comes the opportunity for a cult of honor. If we look to the individual scout we will see the ad hoc office in full relief (Alexander, 1911, p.4): "Wherever there have been heroes, there have been scouts, and to be a scout means to be prepared to do the right thing at the right moment, no matter what the consequences may be." If we take scouting to be the aggregate of scouts and the bureaucracy holding the organization together, we prefer to see it as a mature office in which awareness of a subsidiary ad hoc office is always with the scout as well as his organization (Alexander ibid, p.241): "The boy scout movement is a call to American boys today to become in spirit members of the order of chivalry, and a challenge to them to make their lives count in the communities where they live – for clean lives, clean speech, clean sport, clean habits, and clean relationships with others."

Scout craft also entails all of the finest traits we can associate with an honor-based culture (Herrman, 2016b). Their handbook lists them; a scout is: trustworthy, loyal, helpful, friendly, courteous, kind, obedient, cheerful, thrifty, brave, clean and reverent. Alexander (ibid, p.9) informs us that "the most important scout virtue is that of honor. Indeed, this is the basis of all scout virtues and is closely allied to that of self-respect." In short, the scout applies himself to an imitation of honor, for which reason we list him as a professional, for that is what his office dictates by the considerations we have adhered to (see also the discussion section).

The Handbook has a full chapter each on chivalry, games and athletic standards, and patriotism and citizenship. An afterward to the last of these chapters was included, written by one Colonel Theodore Roosevelt, Honorary Vice-president, Boy Scouts of America. A relevant portion is here excerpted (ibid., p.355): "The same qualities that mean success or failure to the nation as a whole, mean success or failure in men and boys individually. The boy scouts must war against the same foes and vices that most hurt the nation; and they must try to develop the same virtues that the nation most needs." Here is more of the tie linking the application of the scout office to the larger community and its similar principles of value and honor.

"By the time *Hagakure* was written in the middle of the Tokugawa period, it was the lower and middle tiers of samurai, now fully transformed into non-combatant salaried bureaucrats, who sought new meaning to their existence. … The quest for perfection in daily life and dedication to duty provided samurai with a substitute paradigm for accruing honor other than fighting bravely in battle" (ibid, p.19). *Hagakure* was written for these, "and provides a frank commentary on the multifarious issues that samurai had to contend with as they navigated their way through Pax Tokugawa" (ibid, p.21). This text, along with *The Book of Five Rings* and *Budō Shoshinshū* are the books of *Bushidō*.

As with the texts surrounding chivalry, *Hagakure* roused mixed emotions. "Depending on one's point of view, *Hagakure* represents a mystical beauty intrinsic to the Japanese aesthetic experience, and a stoic but profound appreciation of the meaning of life and death.

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Conversely, it may be regarded as a text that epitomizes all that is abhorrent in terms of mindless sacrifice, as well as loathsome depreciation of the value of life and blind obedience to authority" (ibid, p.15).

"The spirit of Hagakure (Tsunetomo, 2014, pp.24-5) can best be summed up by the four simple oaths….

Never lag behind others in the pursuit of the Way of the Warrior
Be ready to be useful to one's lord
Honor one's parents
Serve for the benefit of others with a heart of great compassion

Were we speaking just slightly differently – were we never lagging behind in the 'Way of sportsmanship', and ready to serve our God, we would discover an exact equivalence with Scouting. Here again we are stressing the relevance of sportsmanship throughout these varied examples.

## III. Early Civic Offices

### a) Occasional events

#### i. Mayordomo

In some communities status contests result in a mayordomo "who supervises and finances an elaborate fiesta. It is noteworthy that he…alone receives credit for the effort." (Foster,1961, p.1192). To us this is less noteworthy than is made out, for it seems evident that credit is given because the feast is in part to demonstrate pure motives upon taking the office of mayordomo. As such it is similar to many other accessions to numerous offices in honor-based and traditional societies. He does not just enter an institutional office , he takes on an oath characteristic of the ad hoc office entered into by persons acceding to any variant of high status and power. We take this as a 'type' in which the duties of the new officer are expected to reflect community values and expectations. His implicit oath, evident in holding the feast, makes the latter at the least a brief cult of honor. If he is held to high levels of scrutiny in office, the office also becomes a cult of honor; for the office is by definition more than a function, it is in many regards a 'calling', a function the quality of which is elevated from a simple task or job. In more mundane environments it amounts to Veblen's (1964) 'workmanship'.

#### ii. Mediation

"The concept of the mediator," explains Silverman (1965, p.172), "is relevant to many studies of 'part-societies' which exist within a larger encompassing whole. It describes the pivotal chiefs within colonial nations, whose positions derive from earlier periods of tribal autonomy, as well as the elites looked up to by peasants, deriving from a historical balance between two stable classes; the formal agents of national institutions, who penetrate into communities from distant capitals, as well as the upwardly mobile villagers who move into positions in national institutions."

Firth (1965, p.388) prefers that the term 'mediator' not be used for what Wolf (1956, p.1075) termed 'brokers' and Redfield (1956) called a 'hinge' group. We could just as well choose the composite 'brokered mediation' as a solution to the impasse. Silverman (ibid, p.173) requires that two criteria be met for his 'mediator': the functions mediated must be "of direct importance to the basic structures of either or both systems", and that mediators "'guard' these functions, i.e., they have near exclusivity in performing them…." As with many other similar positions, the mediators are either of elevated rank or will gain higher rank from the performance. 15

Wolf (op. cit, p.1073) describes what is essentially at stake: "An individual who seeks power and recognition outside his local community…must learn to operate in an arena of continuously changing friendships and alliances… However, this manipulative behavior is always patterned culturally… He must therefore learn also the cultural forms in which this manipulative behavior is couched." Depending on the origin of the broker, he finds or creates a cult of honor by which to enable and improve his working with cultural forms while mediating between two cultural entities.

Wherever found, anthropologists define patronage as an informal contract between persons of widely different rank, status and/or power and functions such that (Silverman, op. cit, p.176) "what is owed is protection and favor on the one side and loyalty on the other. The relationship is on a personal, face-to-face basis, and it is a continuing one." From the vantage of a cult of honor, patronage is a replacement serving functions originally prosecuted by kin groups. As such, patronage can become a 'family affair' (ibid, p.179), "the patron becoming 'like a father' in obligations to and respect due from the client…. Personalized terms of address are used, there generally are affective overtone to the relationship, and frequently there is a denial of utilitarian motives and an insistence instead upon the non-priced demands of 'loyalty', 'friendship', or being 'almost like one of the family'." By the same token, it is more usual, especially in rural areas, to avoid relatives as *compadres* if only because (Lewis, 1965, p.432) "it conflicts with the basic notion of respect and social distance that should exist between *compadres*." Success as a *compadre* relies on obeying cultural forms.

What is more, such a patron can become the broker in mediating cross-system contacts. "Their functions are critical ones, for they have an essential part in the basic economic and political structures of the society. Moreover, persons become patrons precisely because their capacity to perform these functions is virtually exclusive. … The patron usually has a distinctly defined status in both systems and operates effectively in both. Furthermore, the relationship between patron and client is stable and durable" (Silverman, op. cit, p.178-9).

The matter of patrons and compadres would be incomplete were we to skip over relationships that primarily gave rise to these two modalities. 'Donship' is a root spawning these others; Romano (1960) distinguished between 'respectables' who earned donship by who they were ('traditional'), and others who obtained it the old fashioned way, by earning it ('achieved'). The latter designation was through esteem, which could be withheld on cause, whereby the title was revoked. The 'achieved' status in particular required a full and total command of all things social and political reflecting respectability, making it a full-fledged cult of honor, meeting the criteria with which we opened the paper, criteria obtained from Romano's study of donship.

iii. *Joking and Flirting*

The manner of joking is as or more important than the fact of it under the circumstances in which it occurs. This is not a matter of 'telling a joke; it is far more a matter of joking *scandalously* in order to prevent actual scandals. The joking ritual presupposes relationships that are necessary but of questionable kinship identification, whence less respect is owing to the other group, while a show of respect must be present to avoid rank insult. Such respect is akin to bringing an audience in on the joke, to share with, identify with, the jokester. The correct amount and degree of joking says, We need you, but we don't owe you anything beyond circumstances in which we owe each other respect and mutual aid or assistance (Mitchell, 1992).

From the vantage of a cult of honor, an important reason for joking is the competitive nature of it. For honor is itself always competitive, individuals quarrying for more and more respect and esteem. Your joking may be bettered by another person's, and so forth. Most issues in culture involving necessary but dubious relationships are dealt with by taboos, which feature no competitiveness whatsoever. One obeys or one does not obey. Even this choice must be averted in the circumstances making a joking relation functional in society. Children are brought up to understand that when joking is called for it is done, no questions asked. Even if immature and sloppy, it is at least still functional. But then, children will get plenty of practice honing their skills.

Osella and Osella (1998, p.190) introduce the topic of flirtation: "In an environment of relative segregation and widespread pre-marital virginity…the penetrating, potent male is a fantasy, a young man's swagger. At the same time, aggressive harassment of girls is only half of the story: idealized romance is equally important. (192)" Chance meetings will typically find the boy with his mates and the girl with her friends. Entering the mutual ad hoc office, they each have a peanut gallery less associated with games than sports. The two compete and are judged, as in the Greek dance of §2.2.1. "The overall effect," say the Osellas (ibid, p.95), "is that of a battle of wits or verbal duel; in fact, one of the preferred forms of flirting is that in which a pair try to outwit each other by posing riddles, or by contradicting or mock-insulting each other."

Interestingly, they next bring up the very rationale I had myself used to place flirting with joking. Citing another anthropologist who remarked (correctly) that joking can be common among cross-cousins who are nonetheless potential marriage partners, they (ibid.) "believe that flirtation can most usefully be seen as a particular type of joking…. We prefer, then, to analyse it as a sub-set of 'joking', an activity which is notable for rupturing hierarchy and turning distance to empathy."

Should it happen that the girl permits a continued conversation (ibid, p.199) "a suitor will drop his aggressive and hostile teasing manner in an abrupt about-face, which sees him composing poetry and memorizing love songs." Where the girl illustrates a demur side even after levelling sexual criticism at an arrogant young man, now it is the suitor's turn to reverse initial insults into their diametrical opposite. Everything here smacks of ritual, and ritual elevates game to sport just as it is essential in identifying with the cult of honor. "So, far from being 'only' a game or an aesthetic, flirting acts out a wider existential condition" (ibid, p.196).

The use of the term 'aesthetic' is notable for it, too, speaks more to sport than to game. It is clearly ritualized flirting as opposed to 'flirting' at work, for example. The ritual is a back-and-forth series of ripostes that are in essence 'aesthetic' and sensitive to consequences. If the occasion goes to completion, we have less a gamesmanship on the part of boys than a sport equally participated in by both – but in different ways, each mindful of the other in a way games rarely demand but a sport must always.

b) *Recurrent events*

i. *Initiations*

Moogk (1980) offered an interpretive view of texts and masks in the Nootka Wolf ritual, important in itself but also because aspects of it were taken up by a number of other tribes in the Pacific Northwest. The following excerpts from her thesis demonstrate the extent to which the ritual encompasses the most important relation in the Nootka society, the development of the chief. This also serves as an example how myth translates, through ritual, the conditions and consequences of power, rank and honor in a society, expressing them as idealized forms not unlike the relation of archaic Greek sport to the gods and heroes.

An analysis of the Wolf ritual itself showed that it is an initiation ritual (ii) … An analysis of the succession of messages conveyed by the three wolf masks as they appear should reveal the Nootkan process for receiving supernatural gifts, i.e., transformation; and the nature of the gifts, i.e. privileges. Both the nature of transformation, and that of the privileges should be the primary and clearest concepts that the wolf mask express if I am correct in assuming that the acquisition of a privilege is the primary Nootkan purpose for holding a wolf ritual (89). … The end product is the Thunderbird, the Standing Wolf mask or the complete man…a human chief. (92)

[The Inbetween] is a realm of process and becoming rather than of being and stability. Obtaining power from the Inbetween is a necessity for the Nootka because it is an essential attribute of moral health; it is also called a life principle or soul. … Since wealth and long life are acquired through ritual, the physical and social status of a man is dependent on his spiritual activity (93). … Only the chief's children inherit the ritual privileges needed to make it possible for novices to cross the Inbetween to acquire the supernatural gifts associated with the ritual and economic privileges that enhance the social status and power of a chief. (96)

A powerful structuralist approach (Rosman and Rubel, 1971, 1972) has put an end to the oft repeated interpretation of the potlatch as "aimed at the shaming and ultimate total destruction of one's rival" (ibid, 1972, p.668). These famous ceremonies are endemic to the North Pacific Coast of the United States and Canada but are also known to the Trobriand Islanders, the Maori of New Zealand and the Fang of Cameroon (and doubtless many others). The structuralist approach has revealed that (ibid., p.669) –

> Potlatches occur on occasions which mark the rearrangement of the social structure, when, in the absence of fixed rules…the outcome of such changes is dependent upon the manipulations of individual actors. At such point, the potlatch serves as a ritual involving host and guests where the latter serve as witnesses to the statement of the new arrangement…. … Potlatches…are in effect *rites de passage* for the society.

Though the potlatch is formally introduced by an occasional event (say, e.g., the death of a chief) and might thus be viewed as an example of the ad hoc office, the reality is that the triggering events are recurrent and that a consistent regularized process has been instituted to handle all such instances. This is the potlatch.

"The potlatch [is] a competitive display…culminating even in the destruction of highly valued property in order to achieve the maximum social effect" (*Notes*: 172). The words 'maximum social effect' mean what they superficially suggest: an acute awareness of the cultural milieu that is maximally expressed, as if to say this is a ritual expressing such cultural material. It is an extraordinary mirror to the structure of society, one which involves very specific relations of giving and receiving in accord with endemic social arrangements (including especially relations of rank and its honor).

It also reflects a cultural subtext infrequently mentioned in the same breath as 'potlatch', namely, the evidence in wealth destruction that these future leaders, for whom potlatches are formally held, will not use wealth to aggrandize upon the community. Thus this ritual is without question drawing attention to and expressing the rules derived from, the social cult of honor. The fact of ritual and public participation elevates an otherwise peculiar contest into a reflection of social ideals.

ii. *Compadrazgo*

This relation involves parents obtaining god-parents for a child. As they share the parenting role they are equally considered *compadres*. Three circumstances dictate how this will be accomplished: "A wealthy townsman has many *compadres*, but he is often on the giving, not the receiving, end of the relationship. The town middle-class people have few *compadres*, and the relations tend to be reciprocal. The town poor and the peasants have few *compadres* and seek to acquire some of them from among the wealthy in order to be recipients of aid" (Service and Service, 1965, p.p. 76-7).

We are interested only in the case where the god-parent is wealthier and able to materially assist in a child's development. The reason is that this properly reflects a stewardship relation between the well-to-do in their felt obligation to the less fortunate. There are relations of honor and etiquette to be mastered, so that the whole involves a veritable cult of honor. With this in mind, the process begins as follows:

"The relationship is initiated," says Foster (1961. P.1183), "on the basis of an explicit, formal contract in which two people agree to be compadres. Yet the system contributes to social stability only when the implicit contract follows – when compadres do in fact cooperate with each other through a system of continuing exchanges." The basis for an exchange are 'services in a ritual context' – "associated with life crises such as baptism, confirmation, marriage and death" (ibid., p.1185).

The compadre will offer financial assistance to the less fortunate that he has formally agreed to help. Where the relationship is steady, assistance is recurrent through these various stages or crises. The recipient is careful not to over-express thankfulness since that would suggest an equivalence of exchange; the message of honor requires an asymmetrical relationship in order to express the elements of honor at an idealized level as befits the cult. "Compadre relationships hold this strategic position by their long-enduring, mutual, socioeconomic commitments which are accompanied by special terminology, imbued with respect and trust, and sustained by compelling sacred sanctions" (Deshon, 1963, p.574). All of these, but especially 'trust' and 'respect', are mainstays in the honor-system celebrated in the cult of honor.

The two compadres in the relation are each creating a cult of honor that reflects and respects cultural values but from the altered conditions of the *compadrazgo* relations and the needs it serves. It offers one, the biological parent, security and stability and the child receives what otherwise would be difficult for the parents to provide; the other compadre fulfills stewardship ideals felt consistent with cultural expectations. Furthermore, the ritual operates cross-culturally, serving distinct prestige systems in accord with their respective cultural patterns but always in agreement with a general archetypal structure examined by Bloch and Guggenheim (1981, pp.383-4). Wherever found,

> "We find the same four symbolic elements noted for the Christian case [i.e. baptism]. In all of them biological reproduction is equated with motherhood…in all cases it is defined as dirty and the child must first be cleansed…. In all cases, substitute parents are given the task of 'producing' the child by a substitute birth and making him a part of this supernaturally created society, a community dominated by men."

All of which tells us that in each instance we have a ritualized interpretation reflecting a social prestige system and its affiliated rules surrounding what is honorable and respectable.

iii. *Societies*

Secret societies generally exist to educate members in cultural lore and values. These are ideals in a very real sense by virtue of being 'secret'. Only the initiates can express the idealized relations of honor that elevate matters to a cult. Little (1949, pp.199-200) offers an excellent overview:

In terms of their institutional personnel and apparatus of hereditary officials, masked spirits: rituals, etc., the secret societies are an embodiment of and a means of canalizing supernatural power. … On the other hand, both their control over supernatural power and their regulation of lay conduct and behavior is, to some extent, departmental, and even a matter of specialization. That is to say, particular fields of the cultural life and their regulation tend to fall within the exclusive province of specific societies. The combined effect, however, is to produce a general pattern of life influenced very largely by secret society activity and function. The extent to which this cultural arbitration and specialization obtains can be studied best by reviewing the various roles which secret societies perform in the secular life.

The Twana secret society (Elmendorf, 1948, p.631), for example, was "superadded to the religious and social complexes expressed in guardian spirit questing and potlatch sponsorship, as an auxiliary device for insuring the fullest participation by an upper class person in his culture." In other words, to ensure the inculcation of the ideals that constitute the cult of honor.

Secret societies and age-sets share in common the use and significance of initiation. A general statement connecting Maasai (of East Africa) initiation as related to the larger social structure is had in their distinction between a killing and a sacrifice of a ritual animal: the sacrifice is elevated and extends the killing to a higher function. As Durkeim would say (in Galaty op. cit, p.366), rites "really strengthen the bonds attaching the individual to the society of which he is a member." In this instance the sacrifice turns an ox into "a virtual icon of Maasai society" (ibid, p.368). By such icons "Maasai society is not only 'represented' or 'expressed' but 'acted upon' in ritual performatives" (ibid.).

One ritual in particular sees the appointment of two men to formal offices which they will retain for life. In keeping with the later public influence they exercise in virtue of these offices, the two must (ibid, p.369) "be morally and physically whole and symmetrical, without blemish or blame, in short, 'holy'." They now exist, at one and the same time, as 'fathers' of the age-set and as adoptive elders, assuming their norms. These exemplifications are iconic as well, "for in their holiness and symmetry they embody not only a perfect ideal…but also the projection of the ideal into the future…." We see better how this expresses a desire to identify with a cult of honor – its ideals, the experience of which is a rite.

In the Karimojong (of northeaster Uganda) "the institutional means…for coordinating groups for political action rest with the age system." This is how Dyson-Hudson (1963, p.358) introduces the age-set relation to the larger society. "The structural principles by which age-based groups are created and interconnected thus establish a generalized status relationship [authority and obedience to it] in Karimojong society and secure the continuity of that relationship through time" (ibid, p.363). As with the Maasai, here also the initiations result in a father-son relation within the age-set "and, as the authority of the fathers individually is final in domestic matters, so is their collective authority, as the senior generation-set, final in public affairs" (ibid, p.367).

Honigmann summarizes an important consideration (1963, p.128): "Generally whenever [age-set] segregation occurs it can be counted on to reinforce bonds of solidarity between those persons who confine a significant portion of their interaction to one another." We will return to the implications of this in the discussion section.

## IV. Mature Civic

### *a) Professional*

#### i. *Golf and Green Bay*

Golf, which many consider to be a silly *game* (chasing a little ball to a hole in the ground), made its triumphal return to the Olympics this last year as one of the esteemed *sports* to compete on the world stage. It seems the place to note broad agreement on two points: the sense in which the Committee (IOC) uses 'game' appeals to the meaning that identifies a game as a civil divertissement of contest or competition. We can also agree that there must be another definition of game which distinguishes it from sport. Referring to sport, the IOC seems to be aiming at what is not a 'game' in this other sense of the word, namely, a game as opposed to a sport. But that takes us immediately to the crux of the problem, for which the Committee is of little or no use.

In the belief that long held customary use leads to reasonable definitions, we adopt the position that intelligent educated people may not be able to define these words but can use them in very similar ways, indicating a culture-wide agreement on the basic formative notions that go into each of our two lead ideas. If I ask ten people whether ping pong is a sport or game relative to the more expansive 'tennis', nine of those will choose 'game' for ping pong. Our objective is to uncover some formulations that agree with a basic logic as well as with commonly received opinion.

Table (2) explains our considered ideas on thinking through the related issues. Half of the six pairs of criteria are ruled by contiguous v. discontiguous play, making this the chief criterion. The second most relevant criterion is the rules of play. The next most dispositive is a clear choice between objective (i.e. to win). The least relevant factor is the remunerative element, but it cannot be simply discounted as we will see in looking at honor-based cultures.

*Structural field:* pattern in which play is permitted (e.g. whole field – such as a board or a table – or a checkerboard design) with respect to rules governing the mode of use. Reflects contiguous mode of play (below), whence **Game.**

*Functional field:* has markers to facilitate play (e.g. scrimmage lines) and/or safe/risk zones (in golf, e.g., sand traps). Reflects discontiguous mode (below), whence **Sport.**

*Structural border* : epiphenomenal limit of play, ergo no penalty because no way to violate the playing area. Reflects contiguous mode of play (board or 'card table' play) – **Game.**

*Functional border:* e.g. out-of-bounds or home run fence comes into play and is associated with absolute (OB penalty in golf) or relative (turnover in basketball) observances in scoring or penalty. Reflects discontiguous mode of play – **Sport**

*Play by using rules:* Judging play by what rules permit or reject ('rule strategy') and/or use a rule for non-intended use but which confers advantage (e.g. fouls in basketball) – **Game**

*Play within rules* ('by the rules'): Rules dictate conduct ('active penalties') as well as play ('procedural penalties') – **Sport**

*Play to win:* Strategy stresses victory and defeat more than placement or attainment **Game**

*Play to achieve* : Achieving first place need not imply focus on defeating opponent **Sport**

*Play dependent on contiguous manipulation* : scoring or playing object is held until placed; e.g. moving a chess piece, or carrying football until tackle or score, etc. – **Game**

*Play dependent on discontiguous manipulation* : Scoring/playing object thrown or kicked instead of being carried. Dribbling in basketball is an example of this activity – **Sport**

*Participation non-remunerative* : That is, the public sees insufficient strategy or excitement to commit to paying to see the action – **Game**

*Participation remunerative* : Public sees reason in mode of play and scoring to accept a cost to watch – **Sport**

*Notes to Table (2)*

1) The same play may entail both structural and functional fields (in tennis, the court is functional with OB lines, service court lines, etc. The service court itself is structural).
2) The choice between using and playing by rules is dictated by a 'best choice' method. Which offers what is most necessary to strategy and scoring?
3) Play can be equally to win as to achieve in some instances. This is admittedly a judgment call.
4) Play can feature both contiguous and discontiguous play and both will therefore be tabulated.

*Table 2:* Differentiae between game and sport

| G-ame/S-port: | | G | S | G | S | G | S | G | S | G | S | G | S |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | SF | FF | SB | FB | PUR | PWR | PTW | PTA | PCM | PDM | NR | R |
| TF | S 4/2 | | X | X | | | X | | X | | X | X | |
| G | S 6/0 | | X | | X | | X | | X | | X | | X |
| T | S 6/1 | X | X | | X | | X | | X | | X | | X |
| TT | G 3/3 | X | | | X | | X | X | | | X | X | |

| | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| BB | S 4/3 | X | X | | X | X | | X | | | X | | X |
| FB | S 4/2 | | X | X | | | X | X | | | X | | X |
| VB | G 3/3 | X | | | X | | X | X | | | X | X | |
| CH | G 4/4 | X | X | X | X | | X | | X | X | | X | |
| GO | G 5/1 | | X | X | | X | | X | | X | | X | |
| MON | G 5/2 | X | X | X | | | X | X | | X | | X | |
| B | G 5/3 | X | | X | | X | X | X | X | X | | | X |
| POK | G 5/3 | X | | X | | X | X | X | X | X | | | X |
| BSB | S 4/3 | X | | | X | X | X | X | X | | X | | X |

*Sports*: TF + Track and Field; G = Golf; T = Tennis; TT = Table tennis; BB = Basketball; FB = Football
VB = Volleyball; CH = Chess; GO = Go; MON = Monopoly; B = Bridge; POK = Poker; BSB = Baseball
*Criteria*: G = Game; S =Sport. SF = Structural field; FF = Functional field; SB = Structural border;
FB = Functional border; PUR = Play using rules; PWR = Play within rules; PTW = Play to win;
PTA = Play toachieve; PCM = Play is contiguous manipulation; PDM = Play is discontiguous manipulation; NR = Non-remunerative; R = Remunerative

With the results of Table (2) we can take any variety of play and obtain a set of criteria that can be mathematically denoted for purposes of reference. This is effected in Table (3) below. Note that a tie of game and sport rating goes to the game. We want special certainty that we arrive at a sport as something more refined in some sense than the game. Note that in two cases (BB, BSB), removing the remunerative factor turns these into ties and changes them from sport to game. In three cases of tie (TT, VB, CH) adding pubic participation translates from game to sport. This is not whimsy, it is significant. Having an active audience reveals a marked disposition toward sport. The more 'compelling' the more likely it will be a sport.

To use Table (3) count the number of 'X's indicating G='game' and likewise for S='sport'. Whichever is the larger takes the label of the winning tally (game or sport). Then express them as a ratio. Except for golf, entries are listed as in the author's judgment they are typically conceived; poker, e.g. is not listed as if 'professional'. Absent the public influence baseball and basketball would be games, not sports. The same happens, as we have seen, in traditional societies where the public is an interested stakeholder. When what is otherwise a game represents (somewhat like a leader) the idealist aspects of an honor-based society, it is hardly unfair to suggest that what is being spoken of is, regardless the objective of the game, a cult of honor. As a cult of honor the game has become a sport. Sport seems to go beyond a game by including cultural content. Our contention is in fact that we can define the distinction between game and sport predominantly by this criterion. Again, it is the leading finding from the table.

The reader may notice that Searle's (1969, pp.39-42) 'constitutive' and 'regulative' rules are not utilized. This is so because for the most part they apply to games equally to sport and thus cannot function as differentiae. In short, the criteria indicative of a sport speak to cultural aspects such as quality, trustworthiness and value to society of the activity – or what the activity represents. These are ingredients of an honor-based society that myth likewise teaches. From Table (3) we propose that when a modern 'dignity-based' society puts out its values in like fashion, we get the same result, a cult of honor.

Golf in the United States is a $70 billion annual industry with 24.1 million players. Golf is 'big', suggesting the relevance of identifying it in terms of game and sport. We see from the material presented that it agrees totally with the Olympic committee's usage 'Olympic Games' but over a hundred 'sports'. This is how we now can look at golf. But does golf have anything to teach us about the nature and character of the sport wherever found? We think the answer is Yes.

Opponents say that golf better meets the definition of 'game' than 'sport', does not require rigorous physical activity, and can be played professionally by people who are overweight, injured, or non-athletic. They argue that golf is a game or leisure activity, and they cite golf's 112-year absence from the Olympics as proof that it is not a sport. Here we assume that talent and strategy and often a goodly share of movement can be said of many games and essentially all sports. The objective was therefore to get behind these seemingly obvious but less than relevant criteria.

Given the role of the public stakeholder it is noteworthy to examine just what indicators of stake the public attends to. A good test of a sport with respect to the cult of honor involves charity. Thirteen baseball teams give an average of 1 million or more per year through their team foundations; 20 teams give at least 500 thousand per year (Littlefield, 2016). Denver Broncos Charity Fund (football) gave an average of some 2 million per year from 1994 to 2003 (Saunders, 2003).

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According to http://together.pgatour.com/, golf, which scored 6 for 6 in Table (3), regularly (some 45-50 tournaments per year) gives an average of a million dollars per tournament to charity. Look up any given tournament for charity proceeds on the site listed above. The average proceeds per tournament appears to be about one million dollars, making the season total some fifty million. And that doesn't count the Web.com or Champions tours.

But it is still more golf's relation to culture that makes it unique among today's sports. It is one of very few that can truly be considered a cult of honor – not just because it so drastically outdoes all other sports in charity, but because the rules of golf and the efforts of individual players demonstrate a pervasive culture throughout the sport. It started hundreds of years ago asa gentleman's sport and has not only not changed in that regard, but goes out of its way to sponsor such conduct among youth golfing enthusiasts. To this day it is in the United States associated with Republicans and their culture. Here is another example in which a cult of honor need not reflect the broad culture but must well reflect a subset of it.

We have seen a tendency for the public to be more involved in sports than games (as we have articulated their differentiae). The public cannot get closer to football than to own their own franchise as does Green Bay with their Packers. Having by comparison erected something approaching a fetish helps us to determine their efforts not just as enthusiasm but as a cult of honor.

i. *The Republican*

Conventionally, the Republican is a member of a political party in the United States. From a cult of honor standpoint, however, the Republican is a member of a *subculture*. That culture is of honor and has been for a very long time. Jefferson (1955, p.160) characterized the South as follows (brackets offer this author's interpretive remarks):

*SOUTH:* Fiery [thin-skinned and impulsive], Voluptuary, Indolent [except to insults to their culture], Unsteady [uneven temper], Independent [fear of dependence], Zealous for their own liberties, Generous [magnanimous, as was Jefferson himself], Candid [unaffected, plainspoken], Without attachment or pretentions to any religion but that of the heart.

Gorer (1948: 15), writing of the 1940's, observes the same distinctions: "The history, the traditions, and even to a large extent the population of the southern states…contrast so strongly with those of the remaining portion of the country that proper consideration would demand for each of these subcultures treatment nearly as extensive as this book."

The upshot is that a Republican, for living his or her culture is by our definition of the mature civic office, no less a professional than the doctor or lawyer. Their technical expertise is in their political platform and religious tenets. What makes the living of a modern culture a cult of honor, however, is a different matter. The issue is one of turning a standard (broadly interpreted) honor-based society into a ritualized equivalent.

The Republicans have managed this by 1) in the past, threatening secession if the north elected Lincoln President (and making good on the promise); 2) throwing overboard the doctrine that disfavors turning a set of religious precepts into a political football, as an attempt to force particularistic rule over the entire culture; 3) voluntarily isolating themselves from a number of publicly available services (e.g. public education), and 4) accusing the larger culture of subverting their own when in fact that larger culture (of liberal persuasion, and dignity-based) is in fact the only true preserver of those very liberties inherent to the religious precepts – and other liberties which the Republican leaders have universally and uniquely failed to protect (equal opportunity, etc.), which finally came to haunt the Party through the selection of Donald Trump.

*b) Personal*

i. *The Liberal*

The liberal person is not living a culture but is participating in a cult of honor which must be carefully defined. The liberal's philosophy, culturally and legally speaking, is *dignity*, the inherent fount of inherent worth and of rights that evidence worth in actual life. As we have allowed honor to be tantamount to customs meriting respect and esteem from a wide swath of the public, so here. In this case dignity is the honorable way of life and living. It is the foundation of the liberal prestige system. It is not, however, a culture, but rather a philosophy of humanism and a political party defending and advocating rights predicated upon dignity.

The liberal has no qualms over the Republican culture but for one detail: the Republicans, as a political party, have decided that their culture is the rationale for the laws that they believe should govern all alike. In short, if everyone lives under Republican laws, the latter may awaken peacefully from sleep assured that their precious children will not suffer themselves to see wicked liberals doing wicked things that distress good Republican values to the quick. There should be a law… and under Republicanism, there *IS* such law (if they could just get it passed in Congress). They have achieved some of this nonsense at the state level, sometimes giving in to financial pressure as businesses move away from Medievalism's lesser valuables.

The liberal sees the courts as a part of the honor cult to the extent that they have stood up pretty decently for dignitarian values. Indeed, Dupré (2011), writing in the *Guardian*, claimed that "Human dignity has therefore emerged as an entirely judge-made concept with an uncertain normative basis and definition, generally located somewhere between the prohibition of torture and inhuman or degrading treatment … and the right to privacy ….”

The liberal projects a normative legal system upon the existing reality (that system exists but is underused, as for example equitable remedies for those abusing offices). Since that legal system's values are predicated upon dignity in the Constitutional documents (notably the Declaration and Preamble), the liberal is imagining it as a fully living document. Activist liberals will actively work to that end. It is the almost fetishistic emphasis on declaring these points and actively proselytizing them widely, together with its sensitivity to the Republicans, that make the liberal stand out as a caricature of an ordinary political philosophy.

ii. *Stewardship*

In 1911 Waldo H. Sherman (1911, p.349) wrote, “Any business that does not benefit society, but on the other hand degrades it, whether run by an individual or individuals in a firm, company or corporation, is a business that ought by the law to be put out of existence.” He was writing in the initial Boy Scout Handbook of 1911. His remarks were followed by the man who 'busted the trusts', Theodore Roosevelt.

What is popular is not always right, not always the most honorable despite the esteem. When the cultural reality raises this issue the cult of honor must be approached from the vantage of truth and rightness. Honor in the sense of esteem may not represent the reality of a proper cult of honor, that which is deserving of praise and esteem. In America, stewardship is not at a cultlevel, whence a company endeavoring to be a good steward, a good citizen, can live in the cult by living in what is true and right. With the lure of 'business as usual', stewardship is an uphill battle. Nevertheless some few have adopted viewpoints and taken actions that permit us to conceive of the cult of honor within a business context.

Henry Ford could have with reason claimed he was practicing a cult of honor. Today, it is possible to include the name of John Mackey despite some missteps. His 'conscious capitalism' opens up the ethics of awareness to social realities that a corporation might successfully address. That is Mackey's (2006) message in a nutshell. One is entitled to presume he would not find overmuch fault with this writer's (2016a, p.19) summary of the principles involved –

> I shall endeavor to apply a small token of my resources in order to determine and apply the best stewardship for my firm's time, talent and money. I shall become a “conscious” capitalist. I shall work with the advice and assistance of charities, and determine what is the best philanthropic bang for the buck, even perhaps in turn assisting *them* to be more efficient in the ways and means of business efficiency, bookkeeping, etc.
> Perhaps we will donate products where they do the best social good; perhaps labor, perhaps investments of money. I am good enough to offer a service or product; surely I have the moxie to establish a “best practices” program, consistent with my business and personal goals, for the community whose trust I am expected to earn and maintain, as well as toward the betterment of conditions for employees and, finally, for the sustainability of the environment. It doesn't require that I go to night school. It requires only an attitude, an awareness—a *consciousness*. I *can* do this. *We* can do this. We *will* do this.

## V. Discussion

As Fallers (1955, p.293) has asserted, “The integrated system is one in which the motivations of its component individuals are to a high degree complementary with the shared systems of value and belief” (see also Herrman, 2016b). It seems needles to add that a cult of honor must obey the same stricture. The question, however, is Why? What makes the cult 'complimentary'? In a word,*ritual*. It is the ritual that, supposing *it* to be complimentary, provides the same to the cult of honor. But ritual is commonly defined relative to those very social values and beliefs. Still, there are issues remaining.

What makes ritual effective as a defining component of the cult of honor? We have mentioned various, but the critical feature is a rarefication from the standard model of prestige mechanics, achieved by caricature of the standard features; a heightened 'outline' with few other than purely stylistic elements to dilute the emphasis upon the icon. What Miller (1955, p.278) employed in the study of the Fox system of authority applies here: “The…system represents the 'purest' manifestation of this kind…and so presents its essential features most clearly for purposes of analysis.”

It is one thing to identify with an ideal; another to participate in a cult of honor. Why, then, do we include secret societies and age-sets when the usual interpretation of an initiation is the educative aspect of it all? In that section Honigmann hit on something, namely, the solidarity, which can be expanded to include the shared participation in *ritual*. It is through ritual that they actually participate in the cult, not solely by virtue of their education. And their participation is, in virtue of their seclusion and their awareness of its importance, the unique experience of the ideal itself, not (for the time being) the actual society. They are in the cult; after initiation, when they enter society, they are ordinarily no longer in the cult but in the society that serves as its pattern. Here, however, the secret society retains uniqueness even in the broader society, thus still qualifying as a cult of honor.

Something similar takes place in creating private virtual sport teams. These cannot be cults of honor, however, because they do not represent the actual sports as a ritual; here, there can be no proper representation of reality that will qualify as a ritual. Those involved are secret groups of coaches making decisions strictly to win a game, not to ritualize participation *in the honor* of real sport. Creating a dream team and betting on it does not mean there is a ritualized representation any more than betting on horses does. Unlike the imaginary 'sport' the real group responsible for creating, nourishing and betting on real race horses might well be a cult of honor.

Of course, all of this means there is undoubtedly a cult, for all the earmarks are present. But an *honor* cult they are assuredly not – until, that is, there is a way to ritualize infractions beyond 'using them' to construct a team, as well as a way to create and conduct the play independent of a mechanical/computer point system. For the same reason, a board game can accomplish much the same thing if with less excitement and detailed involvement.

In Japanese business we see many reflections of Japanese social principles, in particular the widespread paternalism. Are workers receiving these emblematic elements as members of a cult of that culture – or perhaps just of the corporate culture? In neither case are they in a properly constituted cult of honor, for *they are not participating in ritual enabling the experience of ideals*. Borrowing cultural traits between or within cultural sections does not make for participation in a cult of honor, for it does not constitute a cult of honor in the first place.

Talking enthusiastically about ideals can sound a lot like the connoisseurship characterizing one who experiences a cult of honor. Talk is insufficient. Companies occasionally talk up corporate stewardship only to elevate brand awareness and stature. There is a truthfulness in the reality of honor that disqualifies 'talk' from exemplifying the experience we are getting at. 'Walking the walk' is far more to the point for stewardship than any armchair identification with honor (see Herrman, 2009, 2016a).

An Eagle Scout (Townley, 2009, pp.149-150) raised the same question and got the same answer we have just offered: "I'd heard similar musings from Eagle Scouts of all generations…. I explained two of my main questions: How is our generation different and how are we creating a legacy of our own?" The answer, in part: "There should be no reason why we're not going places. There should be no reason why Scouts' faces are not seen on the positive things in society." That counts for a cult of honor.

We tend to think we can study our way through a cult of honor. The literature within the chivalric age and since has been as critical as laudatory (Kaeuper, 1999, p.209). Reading about it all is fascinating, but not the stuff of participation in the cult – *unless, that is, what one studies is/was itself a genuine cult of honor*. *It also requires making something of a fetish of such study, something the onlooker notices and remarks upon*.

"The pragmatics of ritual," explains Galaty (1983, p.364), "must be contrasted with the structure of ritual 'texts', as such – not being written – exist as the codification of the aims, rules, attitudes and events of a given rite." We opened the paper claiming that the modalities of the ad hoc offices were ritualistic, where by that term we mean as the excerpt above suggests, and which begs the question as to the distinction between a ritual and a rite as it relates to the cult of honor. In fact, the participation in *any* cult of honor office is ritual in the context of a rite; what is relevant is how the modality is influenced in the progression from ad hoc to early civic and then to mature civic offices.

Table (4) summarizes the thirty cults discussed in the paper with respect to the place and purpose of the rituals involved. Rituals may reflect past or present, or they may represent the living past or present. In the table the italicized entries are all from the early civic office category. The symmetry is to be noted.

We will say that the content of the cult consists precisely of the 'codification of the aims, rules, attitudes and events' and that the experiencing – the 'coming to experience' – of these items *is* the 'rite'; and the manner by which the experience is effectuated is by modalities we prefer to label 'rituals'.

The single essential and defining objective of one's relation to a cult of honor is specifically to 'identify' with both the rite and the items experienced, namely, the aims, rules, attitudes and events. The rituals achieve this in the ad hoc office by *figurative* means; in the early civic offices by *emblematic* means, and in the mature civic office by *imitation*. That is, the ad hoc modalities of art, ethics, sport, etc. are *symbols* the use of which enable us to identify with the content of the cult. In the early civic offices we find formally simplistic *representations* of the actual cult activities and meanings where there are real parallels to be found between representation and reality. In the mature office we practice actual *applications* of what we identify with in our imitation.

We can then suppose that with the mature office the officeholder 'owns' the experience. By the same token the ad hoc rituals 'celebrate' the cult, whereas the early civic offices manifest 'appreciation' of it. In short, as we begin with the most primitive or basic office, we progressively come closer to a full and faithful identification, achieving full identity with the mature office. Curiously, however, the aesthetic pleasures involved in these identificative ritual experiences appear to follow the reverse order, being the most acute in the ad hoc offices and least intense where the actual application carries such responsibilities as to rob us of a part of the ideal experience.

*Table 3:* Differentiae in various play types

| Example | Reflecting Past | Reflecting Present | Living Past | Living Present | Provenance Internal | Provenance External | Potential Cultural Influence |
|---|---|---|---|---|---|---|---|
| Leadership | | X | | | | X | X |
| Poetics | | | | X | | X | X |
| Bards | X | | | | X | | X |
| Dance (1) | | | | X | X | X | |
| Dance (2) | | | X | | | X | X |
| Tea Party | X | | | | X | | |
| Karate-do | X | | | | | X | |
| Merit | | | | X | | X | X |
| Bargaining | | | | X | X | | |
| Samaritan | | | | X | X | X | X |
| Chariots | | X | | | | X | X |
| Chivalry | | | X | | | X | X |
| Scouting | | | | X | | X | X |
| Bushidō | | | X | | | X | |
| *Mayordomo* | | | | *X* | | *X* | *X* |
| *Mediation* | | | | *X* | | *X* | *X* |
| *Patronage* | | | | *X* | | *X* | *X* |
| *Joking* | | | | *X* | | *X* | *X* |
| *Flirting* | | | | *X* | | *X* | *X* |
| *Initiation* | | | | *X* | | *X* | *X* |
| *Potlatch* | | | | *X* | | *X* | *X* |
| *Compadres* | | | | *X* | | *X* | *X* |
| *Society* | | *X* | | | *X* | | *X* |
| *Age-set* | | *X* | | | *X* | | *X* |
| Golf | | X | | X | X | | X |
| Republican | | | | X | | X | X |
| Liberal | | | | X | X | X | X |
| Steward | | | | X | X | | X |
| Volunteer | | | | X | X | X | X |

Finally, the relation between ritual and prayer could use some clarification. By 'prayer' we imply a desire for communion of some sort, be it pity, acceptance or regard. All of these are forms of identification, the objective of those interested in partaking of the honor cult experience. Prayer utilizes and effectuates what ritual provides; it connects ritual with rite.

## VI. Conclusion

What all of this leads to is the proposition that sportsmanship is everywhere a component of a cult of honor and typically one of its identifiable (one had almost said 'defining') characteristics. It implies that systems of prestige are perfectly capable of adhering to values associated with sportsmanship despite the widely recognized 'gamesmanship' of their politics. There is an elevation, a reemphasis, of cultural ideals through the auspices of ritual, not excluding a degree of competition intended to preserve the expectations owed of such cults.

Western Europe and especially the common law nations are what can be termed 'dignity-based' cultures for establishing concepts of worth upon a doctrine of inherent dignity. Though less than ten percent of the world population they ever increasingly relevant. Yet the results of this study suggest that the individualist character of these societies has influenced the incidence and character of honor cultures so as to diminish them in the public perception.

One easily imagines that in Iran and Russia chess at the professional level is effectively a sport. The dignity contingent will see it as a board game and stop there. In Russia, ballet is, if not a sport, a national topic and a cult of honor. Not so elsewhere. In most areas of the world dance is readily ritualized; not so in the most developed nations. These findings are in line with the results of material tabulated in Tables (2) and (3) despite reasonable disagreements over my choices.

At issue may well be the question of honor cults in one's comprehension of 'culture'. This paper can without injustice be characterized as attributing less culture to the dignity-based and more to 'the rest'. The most important speeches in today's dignity-based societies are secured through paid writers. Gone are the days of Lincoln, each of whose written presentations is exemplary of what can only be a cult of honor relative to current practice.

I would like only to add something of a *mea culpa* that I nonetheless mustn't apologize for. From an academic's point of view the paper may appear to read as a senior thesis written 'around' excerpted material. In fact, the paper is largely a series of short analyses with to-the-point excerpts explicating what I could paraphrase only by plagiarizing. They are excellent for the purpose they serve in this paper and their authors are, after all, the anthropological experts. I am a metaphysician, developing the structuralist methodology aback the presentation. I accordingly ask to be excused from otherwise valid criticism.

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# An Investigation of Indigenous Knowledge and Institutions Contributing to Natural Forest Conservation in Yayo and Gechi Woreda, Illuababor Zone, Oromia National Regional State, South West Ethiopia

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*Abstract-* The study was conducted to investigate the indigenous knowledge and institutions contributing natural forest conservation in Yayo and Gechi woredas in Iluabbabor zone, Oromia regional state, southwest Ethiopia. To this end survey was conducted with 120 randomly selected household heads. Moreover, in-depth interviews were employed with informants to collect information required for the study. Quantitative and qualitative data was collected and analyzed using percentages and thematic analysis.

The findings of the study indicated that the studied communities have special meaning and value for natural forests in their surroundings. Generally, forest is considered as "a source of life" for these communities as almost all basic requirements for human being stem from their natural forests. Consequently, the communities had been providing special care and protection for their natural forests through their indigenous knowledge and institutions.

*Keywords: indigenous knowledge and institutions, natural forest conservation, yayo and gech woreda.*

*GJHSS-C Classification: FOR Code: 820199*

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# An Investigation of Indigenous Knowledge and Institutions Contributing to Natural Forest Conservation in Yayo and Gechi Woreda, Illuababor Zone, Oromia National Regional State, South West Ethiopia

Gudina Abashula [α], Disasa Merga [σ] & Hassen Nagesso [ρ]

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Moreover, the findings indicated that the government has been undertaking various activities that contribute to the local communities' indigenous knowledge and institutions with regards to natural forest conservation, however, still many things are left to be done in linking the formal government and the local communities' effort to ensure the sustainable use of these resources. Therefore, the continual implementation of the already started community mobilization and participation in conservation of the existing natural forests, creating other income generating sources for the local communities and the integration of indigenous knowledge and institutions in government activities intended to conserve natural forest were recommended based on the study findings.

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## I. Background and Justification

Indigenous knowledge also known as traditional knowledge refers to the practical experiences originated from a given community and sustained for a long period of time. According to Gadgil et al. (1993) indigenous knowledge is defined by as "a cumulative body of knowledge and beliefs handed down through generations by cultural transmission about the relationship of living beings (including humans) with one another and with their environment." "Traditional environmental knowledge is a body of knowledge and beliefs transmitted through oral tradition and first-hand observation. It includes a system of classification, a set of empirical observations about the local environment and a system of self management that governs resource use. Ecological aspects are closely tied to social and spiritual aspects of the knowledge system. With its roots firmly in the past, traditional knowledge is both cumulative and dynamic, building upon the experience of earlier generations and adapting to the new technological and socio-economic changes of the present" according to Dene Cultural Institute 1995 cited in (Stevenson, 2005).

The indigenous/traditional institutions on the other hand refer to the social norms, values, beliefs, rules, regulations and principles of a community in a specific area. Indigenous institutions guide human behaviour and interactions with each other as well as their environment including forest resources. For instance, in environmental pro-culture where environmental resources are highly valued, the individual members of the society do not engage in the indiscriminate destruction of the resources as the existing societal values, rules and regulations do not allow them to do so. Because the existing social institutions and values dictate that the indiscriminate destruction of natural resources including a forest is taboo. Such taboo serves the function of distinguishing between the profane and sacred. Places and species in the environment are classified into profane and scared accordingly. The sacred natural site is reserved space, established by a community, a group of people or an individual, following the conventions based on specific phenomena and requiring the respect of engagements taken at this place in order to satisfy the spiritual, cultural and socio-political needs while focusing on the harmony and wellbeing of the native community, as well as of the whole humanity according to Kamga-Kamdem( 2008) cited in (Negi,2010:186).

Theses social taboos are in most cases informal, unwritten and invisible rules and regulations which are based on cultural norms that do not depend on government either for their promulgation or for their enforcement. They include any form of shared constraint that human beings devise to shape their daily interactions and transactions with each other as well as with their environment. They are decentralized, commonly shared and self-enforced themselves even in the absence of the external formal authority (North, 1990; Knight, 1992).

For decades, these traditions have encouraged community driven nature conservation attitudes and have ensured the conservation of native biodiversity (Udeagha et al, 2013:696).

Because, these social institutions put restriction on the type, the place and amount of natural resources extracted from environment. They also put restriction on human interactions with environment by regulating who should be involved in natural resource extraction, how, when, which type and what amount of the natural resources have to be used to meet the various human needs. Violations of these institutions are considered as violation of the law of creator (Negi 2010:190-195). Hence, if the taboos are transgressed, expiation and ritual ceremonies are undertaken to reconcile the violators to their creator. A breach of such law is believed to bring divine wrath on the entire society. In so doing, the taboo institutions reduce the withdrawal or harvesting pressure on particular subsistence resources. Thus, they have much contribution to the conservation of habitats, and of biodiversity, both temporally and spatially (North, 1990).

Conservation of natural resources is the wise use of the earth's resources by humanity. It is the management of valuable natural resources such as timber, fish, topsoil, pastureland, and minerals, forests, wildlife, parkland, and wilderness and watershed areas (Rim-Ruke, Irerhievwie and Agbozu, 2013:426). Smith and Wishnie (2000) describe that conservation involves institutions and actions that prevent or mitigate biodiversity loss and are designed to do so. Thomas (2003) on the other hand argues that conservation involves the sacrifice of immediate rewards of natural resources in return for future ones.

Natural resources in general and natural forests in particular have immense contribution for the socio-economic development of any society. Because human being depends on natural resources especially on forests for a number of his/her competing needs. The various inputs we need to produce different types of goods and services directly or indirectly come from forests. Forest is a source of our shelter, food, water, clothes, fresh air, energy and clean environment. Forests and the benefits they provide in the form of wood, food, income, and watershed protection have an important and critical role in enabling people to secure a stable and adequate food supply (Badege, 2001).

Hence, human being has developed institutions that contribute to the conservation and sustainable use of natural resources including forests. Indigenous institutions and knowledge are part and parcel of the institutions. According to Negi, such social institutions exist in invariably in all cultures throughout the world and define the human behavior towards the exploitation of the natural resources. However, the role of these informal institutions in conservation of biodiversity has not been given its due emphasis (Negi, 2010:187).

In Ethiopia, forests play a considerable role in the maintenance of environmental stability (soil erosion control, soil fertility maintenance, catchment protection, and micro-climate amelioration), provision of fuel wood, saw logs, building, and construction materials (Teshome, 2009). Deforestation and land degradation, however, have been impairing the capacity of forests and the land to contribute to food security, and to provide other benefits, such as fuel wood and fodder in Ethiopia. Ethiopia has been facing rapid deforestation and degradation of land resources. The continuous increase in population size has resulted in extensive forest clearing for agricultural use, overgrazing, and exploitation of existing forests for fuel wood, fodder, and construction materials. Consequently, forest areas of the country have been reduced from 40% a century ago to an estimated less than 3% in the past four to five decades (Badege, 2006). However, currently with the afforestation, environmental resources protection and prevention measures taken, the forest coverage of the country has become 15 per cent (FDRE Ministry of Agriculture, 2014).

Persistent failure to address the underlying causes of deforestation and forest degradation, and fundamental issues related to the rights and interests of local and (especially) indigenous peoples have hindered past efforts to slow deforestation and forest degradation, and to promote conservation and sustainable use of forest resources (Parrotta, 2012).

Indigenous knowledge and institutions may often contribute many things to the conservation and the enhancement of biodiversity; however, in most cases these indigenous communities, their knowledge and institutions were neglected in the past by development planners (Cooper, 2010; Negi, 2010:187).This day, however, there is a growing interest among governmental, non-governmental and scholars for the recognition of traditional knowledge, values and cultural practices for sustainable management of forest resources and improving human well-being (Parrotta, 2012).

Deforestation is believed to be low where there are environmentally pro-cultures, institutions, knowledge, taboos and practices. Although many parts of Ethiopia are highly deforested even recently, still there are also areas with densely natural forests in the South and South West of the country. Illuababor zone in Oromia National Regional State is one of the areas known for its evergreen densely natural forests today. This indicates there might be indigenous knowledge and institutions that helped the local communities to live harmonious economic, spiritual, and cultural relationship with their environment in general and their natural forest in particular. However, no study has conducted yet in this area regarding the indigenous knowledge and institutions contributed to the conservation of the natural forests as far as the knowledge of the researchers are concerned. These knowledge and institutions has to be identified through empirical evidence based studies and further strengthen for sustainable natural forest utilization and conservation of the area. Therefore, this study will be conducted to answer the following research questions.

*a) Research questions*

- What are the indigenous knowledge and institutions that contributed to natural forest conservation in the study area?
- How do the indigenous community and their knowledge contribute to sustainable forest conservation?
- To what extent the indigenous knowledge and institutions contributed to natural forest conservation have got government policy recognition?

*b) Research objective*

i. *General objective*

The general objective of the study is to explore the indigenous knowledge and institutions contributed natural forest conservation in the study area.

ii. *Specific objectives*

- To investigate the community perception about the benefits of natural forests
- To explore the meaning attached to natural forests by the local community
- To identify how the community classify and use different types of plant species of natural forests
- To examine the indigenous institutions contributing to natural forest conservation in the study area.
- To examine the government policy supports given for the indigenous knowledge and institutions contributing to natural forest conservation.

## II. Methods of Data Collection

*a) Study design*

120 households were randomly selected from four kebeles namely Bondao and Waboo from Gechi woreda, Imbro and Yemboo kebele from Yayo woreda. Then, a cross-sectional survey and in-depth interviews was conducted zone from March, 2015-May, 2015 to collect data in order to answer the research questions mentioned above. These woredas are purposively selected because much proportion of their land is covered by densely natural forests according the information from Iluababor Zone Natural Resource Office.

The data collected was analyzed using quantitative and qualitative methods of data analysis. Quantitative data was analyzed using percentages and chi-square specifically to investigate the association between the respondents' gender, occupation and the mechanisms to conserve natural forests in their surrounding while thematic and descriptive narrations were used to analyze the qualitative data.

## III. Results and Discussions

This section is concerned with the analysis of empirical data obtained through household survey, semi-structured observations, key informants and in-depth interviews.

*a) Socio-demographic characteristics of the respondents*

*Table 1:* Age, sex and religious backgrounds of the respondents

| Socio-demographic characteristics | frequency | Percentages |
|---|---|---|
| Age | | |
| 18-24 | 8 | 6.7 |
| 25-34 | 31 | 25.8 |
| 35-44 | 60 | 50 |

| | | |
|---|---|---|
| 45-54 | 9 | 7.5 |
| 55-60 | 7 | 5.8 |
| >60 | 5 | 4.2 |
| **Total** | 120 | 100 |
| **Sex** | | |
| Male | 105 | 87.5 |
| Female | 15 | 12.5 |
| **Total** | 120 | 100 |
| **Religion** | | |
| Orthodox | 13 | 10.8 |
| Protestant | 27 | 22.5 |
| Islam | 77 | 64.1 |
| Catholic | 3 | 2.5 |
| **Total** | 120 | 100 |

*Source: 2015 Own field survey*

As it is table 1 indicates, 8(6.7%) of the respondents are between 18-24 age, 31(25.8%) 25-34, 60(50%) 35-44, 9(7.5%) 45-54, 7(5.8%) 55-60 and 5(4.2%) >60 years of age. Regarding their sex, 105(87.5%) of them are males and 15(12.5%) of them are females.

*Table 2:* Educational and occupational background of the respondents

| Education | frequency | Percentages |
|---|---|---|
| Can't read and write | 2 | 1.7 |
| Read and write | 44 | 36.7 |
| 1-4 grade | 30 | 25 |
| 5-8 grade | 31 | 25.8 |
| 9-10 grade | 9 | 7.5 |
| 11-12 grade | 4 | 3.3 |
| **Total** | **120** | **100** |
| **Occupation** | | |
| Private employee | 6 | 5 |
| Government employee | 4 | 3.4 |
| Farmer | 109 | 90.8 |
| student | 1 | 0.8 |
| **Total** | **120** | 100 |

*Source: 2015 Own field survey*

Concerning their educational background, 2(1.7%) of the respondents cannot read and write, 44(36.7%) of them can read and write, 30(25%) of them were 1-4 grades, 31(25.8%) of them were 5-8 grades, 9(7.5%) of them were 9-10 grades, 4(3.3%) of them were 11-12 grades. Likewise, 6(5%) of them were private employee, 4(3.4%) of them were government employee, 109 (90.8%) of them were farmers and 1(0.8%) of them was a student.

### *b) Community knowledge about the benefits of natural forests*

One of the objectives of this study is to investigate the community knowledge about the benefits of natural resources. Accordingly, the 120 local communities or household heads in the four kebeles in the two woredas of Illuababor zone covered under this study described that forests in general and natural forest in particular is a source of life as it gives the following benefits for them.

*Table 3:* Respondents' knowledge about the benefits of natural forests

| Benefits obtained from forests | frequency | Percentages |
|---|---|---|
| House and fence construction | 113 | 94.2 |
| household furniture | 115 | 95.8 |
| Agricultural equipments | 118 | 98.3 |
| Fuel | 117 | 97.5 |
| Serves as sources of various types of medicines | 95 | 79.2 |
| food | 87 | 72.5 |
| Serves for recreation | 66 | 55.0 |
| Balancing weather conditions | 89 | 74.2 |
| Serves as shelter for wild animals | 73 | 60.8 |

| | | |
|---|---|---|
| Serves as sources of clean air and water | 64 | 53.3 |
| Serves as source of rain | 92 | 76.7 |
| Total | 1029* | 857.5* |

*Source: Source: 2015 Own field survey*

*N.B:* * The total number in table 3 is greater than the actual 120 household interviewed because the respondents have given more than one response for this specific question. Similarly, the corresponding percentage to each response is calculated out of the 120 households interviewed for this study and its summation is greater than 100% due to more than one response given by respondents for the specific question.

As indicated in table 3 above, 113(94.2%) of the 120 household heads interviewed responded that forests are used for house and fence construction, 115(95.8%) making household furniture such as table, chairs, bed, box…etc,118(98.5%)agricultural equipments,117(97.5%) fuel(firewood), 87(72.5%) food, 66(55%) recreation, 89(74.2%) keeps the balance of weather condition, 73(60.8%) serves as shelter for wild animals, 64(53.3%) serves as sources of clean air and water and 92(76.7%) serves as source of rain.

The qualitative data obtained from the in-depth interview also revealed that forests in their localities provide various types of benefits for them. Two of the informants have described the benefits of forests as follows.

*c) Community knowledge about the type of trees in their surrounding natural forests and their use*

The respondents not only know the benefits obtained from natural forests but also they identified the types of tress from which the specific benefits are obtained. The following table shows the types of trees and their corresponding benefits according to the respondents.

*Table 4:* Respondent's knowledge about the major types of trees in their surrounding forests and their respective benefits

| S/ No | Name of the trees | Its use | Freq. | % |
|---|---|---|---|---|
| 1 | Amababeessa(*Albizia gummifera)* | House construction, shade and firewood. It is also used for curing stomach ache | 97 | 80.8 |
| 2 | Waddessa(Cordia Africa) | House construction, house furniture and timber. It also used to cure skin rash | 83 | 69.2 |
| 3 | Bakkaniisa *(Croton macrostachyus)* | Used for blood clotting, honey production, firewood and shade for coffee | 85 | 70.8 |
| 4 | Geeshoo(Rhamnus prinoides) | For brewing local drinks such as *teji* and *tella.* It also cures tonsillitis | 117 | 97.5 |
| 5 | Baddeessa(*Syzygium guineense*) | For house construction, firewood and medicine for stomach ache | 64 | 53.3 |
| 6 | Ulaagaa(*Ehretia cymosa)* | Firewood, house construction , medicine for toothache and livestock shivering | 105 | 87.5 |
| 7 | Heexoo(*Hagenia abyssinica)* | Medicinal plant used for killing human intestinal parasite such as tapeworm | 118 | 98.3 |
| 8 | Ceekaa (*Calpurnia aurea*) | Its leaves crushed and used to cure animal stomachache and ecto-parasite | 78 | 65 |
| 9 | Ulmaayyaa(*Clausena anisata)* | Stick, farm equipments and to cure fibril illness | 115 | 95.8 |
| 10 | Ejersa(Olea europaea) | House construction, cleaning beehives medicine for headache and asthma | 56 | 46.7 |
| 11 | *Damakasee(Ocimum lamiifolium)* | Medicine for curing mouth bad smell, headache and cough | 113 | 94.2 |
| 12 | Arbuu(*Ficus sur forsk.*) | For timber (plank), construction | 96 | 80 |
| 13 | Qilxuu(*ficus vasta*) | Firewood, shade and fencing | 116 | 96.7 |
| 14 | Hommii(*Pygeum africanum)* | For timber and fire wood | 113 | 94.2 |
| 15 | Birbirsa(*Podocarpus procera)* | Fragrance odor, house construction, firewood and timber | 103 | 85.8 |
| 16 | Doddota | For house building | 78 | 65 |

| | | | | |
|---|---|---|---|---|
| 17 | Soondii | Firewood, shade for coffee | 102 | 85 |
| 18 | Sootalloo | Firewood, shade for coffee and preparing farming equipments | 107 | 89.2 |
| 19 | Lolchiisaa(*Bersama abyssinica*) | Firewood, fence and curing wound | 114 | 95 |
| 20 | Qaraaroo | For timber | 118 | 98.3 |
| 21 | Odaa(*Ficus sycomorus)* | Its shade is used for gatherings and discussing all matters especially by the Oromo people | 109 | 90.8 |
| 22 | Warangoo(*Foeniculum vulgare)* | Firewood and fence | 75 | 62.5 |
| 23 | Bosoqaa(*Kalanchoe pettitiana*) | For firewood, coffee shade and curing wound | 112 | 93.3 |
| 24 | Ba'aa | For cleaning and fumigation of bee hives | 117 | 97.5 |
| 25 | Somboo( Ekeberigia capensis) | Firewood, house construction and fumigation of beehives | 113 | 94.2 |
| 26 | Mixoo(*Rytigynia neglecta*) | Firewood, fencing and stick | 106 | 88.3 |
| 27 | Lookoo | Stick and farming equipments | 102 | 85 |
| 28 | Qolaatii | Stick and farming equipments | 103 | 85.8 |
| 29 | Laaftoo(*acacia abysinica*) | Firewood, shade for coffee and medicinal for curing skin rash | 113 | 94.2 |
| 30 | Botoroo(*stereospermum*) | Firewood, hose construction and medicine for snake bite | 76 | 63.3 |
| 31 | Agamsa(*Carissa spinarum*) | Its fruit is edible. Its root is also used to cure impotence | 56 | 46.7 |
| 32 | Abayi(*Maesa lanceolata Forssk.*) | Medicinal plant for animal leech infestation. It also cures rabies and body wound due to bat urine | 67 | 55.8 |
| 33 | Ebicha(*Vernonia amygdalin)* | Fire wood, cleaning beehives, medicinal plant for animal pastrolosis and abdominal pain | 96 | 80 |
| 34 | Meexxii(*Phoenix reclinata*) | For house decorations and medicine | 88 | 73.3 |
| | Total | | 1955* | 2759* |

*Source: Source: 2015 Own field survey*

*N.B:* * The total number in table 4 is greater than the actual 120 sampled households because the respondents have given more than one response for this specific question. Similarly, the corresponding percentage to each response is calculated out of the 120 households interviewed for this study and its summation is greater than 100% due to the fact that more than one response given by respondents for the specific question.

As it is shown in table 4 above, the majority of the respondents know the major types of tress in their surrounding natural forests and their corresponding specific uses. Most of the respondents frequently mentioned that they use the major types of trees in their natural forests for house construction, firewood, fence and curing different types of human and animal diseases. Moreover, trees like Ejersa (Olea europaea), Somboo (Ekeberigia capensis) and *Ba'aa* are used for cleaning and fumigation of beehives as they have special odor to attract bees from long distance.

*d) Meanings and values attached to natural forest by the local community*

Because of the different types of benefits they obtain from the trees in their surrounding natural forests, the respondents and informants argued that forest is "a source of life" for them. Thus, they consider it as one of the most precious natural resources endowed to them by nature. The following table summarizes the definitions of a forest frequently mentioned by the respondents.

*Table 5:* Respondent's definition of a forest

| S/No. | What does natural forest mean for you? | Frequency | % |
|---|---|---|---|
| 1 | Land covered by a giant trees | 25 | 20.8 |
| 2 | A source of water and air | 21 | 17.5 |
| 3 | A home for various animal species | 13 | 10.8 |
| 4 | Everything for human beings | 18 | 15 |
| 5 | A source of life of all living things | 16 | 13.3 |
| 6 | A security of our life | 11 | 9.2 |
| 7 | A source of freedom, love and respect | 9 | 7.5 |
| 8 | It is a source of life for human beings | 7 | 5.8 |
| | **Total** | **120** | **100** |

*Source: Source: 2015 Own field survey*

As indicated in the above table, the respondents define forests in different ways. Accordingly, 25 (20.8%) said that a forest is land covered by giant trees, 21 (17.5%) a source of water and air, 13 (10.8%) a home for various animal species, 18 (15%) everything for human being, 16 (13.3%) a source of life of all living things, 11(9.2%) a security of our life, 9(7.5%) a source of freedom, love and respect and 7(5.8%) it is a source of life for human beings.

The qualitative data also confirms the fact that forest is most precisions and valuable resource equated with the base for human life. One of the informants participated in in-depth interview for this study described the meaning and values attached to forest among his community as follows.

*Informant 1:* Male, 37 years old. Forest is everything for our community. It is the main source of our basic needs and means of livelihoods. We make household furniture and construct houses with wood from forests; we use the roots, leaves and fruits of some trees in our surrounding for food and medication to cure ourselves and livestock from disease. We use the shades of trees to take rest, recreate and discuss all matters related to our economic and social life under it. We also prepare agricultural equipments from the trees. Hence, shortly stating, forest is the source of our life without which we cannot even survive.

Another informant further described the benefits of forest as follows.

*Informant 2:* Male, 42 years old. For me forest is a source of life because we get many things such as food, air, shelter, water and various types of medicines to protect and cure ourselves from disease. We also plant various types of cash crops such as coffee, ginger and various types of spices under the shade of trees in our surrounding forests. These things are very crucial for our life as we cannot exist without them. For these reasons, for me forest is the source of life.

*e) Indigenous knowledge and institutions among the local community to conserve natural forests*

The other objective of this study is to identify the indigenous knowledge and institutions available among the local communities to conserve forests. As forests fulfill almost all of the basic things required for the survival of human being, the local communities in the study area protect forests from destruction through their various indigenous knowledge and institutions. The following table depicts the various mechanisms which those communities use for this purpose.

*Table 6:* Respondent's knowledge about traditional mechanisms to conserve natural forest

| S/N | Mechanisms to conserve forests | Frequency | % |
|---|---|---|---|
| 1 | Delineation of intact sacred forests | 21 | 17.5 |
| 2 | Selective use of plant species | 37 | 30.8 |
| 3 | Limitation of the amount of natural forest use | 34 | 28.3 |
| 4 | Fluctuation of the use of natural forest species based on seasons | 28 | 23.3 |
| | Total | 120 | 100 |

*Source: Source: 2015 Own field survey*

As table 6 indicates, respondents gave different mechanisms used by the local communities to conserve their natural forests in general and the various species of trees in their surroundings. Accordingly, 21(17.5%) said delineation of intact sacred forests, 37(30.8%) said selective use of plant species, 34(28.3%) and 28(23.3%) of them said fluctuating the use of natural forests based on seasons.

Chi-square was calculated in order to investigate the association between the respondents' sex and their knowledge about the various traditional mechanisms to conserve the natural. The chi-square result found that there is a significant association between male and female respondents with respect to their knowledge about the mechanism to conserve natural forests with ($X^2(1)$ = 12.668, p=0. 000) at ($\alpha$=0.05). The lambda coefficient with the value of 0.65 indicated that the association is moderate. Males relatively know more of the traditional mechanisms to conserve natural forests than females. In the same manner, the chi-square result with ($X^2(3)$ = 67.568, p=0. 000) at ($\alpha$=0.05) showed that there is a significant association between the respondents' occupation and their knowledge about the traditional mechanism to conserve natural forests. The lambda coefficient with the value of 0.71 indicated that the association has strong influence. These traditional mechanisms of conserving natural forests are widely known among farmers compared to other groups. The qualitative data obtained from the informants also supports these empirical evidences as analyzed below the matically.

i. *Delineation of intact sacred groves and trees*

One of the mechanisms by which the local communities protect forests from destruction is through separation of intact grooves and trees from the ordinary one. Most of such groves and trees are those planted over places where ancestors were buried. These trees are never cut down by anybody else. Rather, they serve as sacred areas where rituals are exercised for the past many years to get reconciliation and blessings from ancestral ghosts as one of the informant described it. The second informant interviewed for this purpose has described this scenario as follows.

*Informant 2:* Male, farmer, 42 years old Various types of tress such as Qilxuu (ficus vasta), harbuu (ficus sur), Ejersa (prunus Africanum), Laaftoo (Acacia abyssinica) and Birbirsa(Podocarpus procera)were considered as sacred trees in the past. Hence, they were worshiped and served dhibaayyuu (drink offering) by the devotees. These kinds of trees were not cut down for simple purpose in the past rather they are given special care and nurture from the communities. However, the sacred belief associated with such trees and the subsequent care and protection provide for them (the trees) has been declining from time to time as the key informant further elaborated. Due to this, currently very few people know the sacred meanings attached to such areas and hence, these trees have become a target for meeting various human needs.

ii. *Selective use of plant species:* A part from delineation of sacred forests from the profane, the other mechanism by which the local communities in the study area conserve forests is through selective use of the various plant species. The communities have their own normative ways of avoiding indiscriminate destruction of natural forests. One of the informants interviewed has described how this patterned selective use of plant species work as follows.

*Informant 3:* Male, farmer, 39 years old. We have traditional knowledge inherited from our fathers and mothers concerning the use different types of trees in our surroundings. For example, it is strictly forbidden to cut down a tree at its infant stage as it cannot rejuvenate. Only matured and old trees are used for various purposes such as house construction, fencing, charcoal, firewood …etc. Some trees are also used only for specific purposes. Trees like Heexoo (Hagenia abyssinica) are never used other than medication purposes. For instance, they are not used for house construction, fencing…etc. Medicinal needs involves taking little amount of any part of that tree and hence has little pressure on that tree species.

iii. *Limiting the amount of natural forest used and its purposes*

The third mechanisms by which the communities reduce the pressure over their natural forest is by limiting the amount of different types of trees in their environs. The third informant mentioned above described what does this mean as follows.

*Informant 3:* Male, farmer, 39 years old

The amount of different types of trees and their parts withdrawn from natural forests is informally limited and internalized at household level. Only those trees permitted are used for specific purposes which are basic for the survival human being. These include house construction, fencing, firewood, medication, making household furniture and agricultural equipments. Nobody dares to use trees and their parts for commercial purposes which put much pressure over the various species of plants and subsequently paves the way for destruction of natural forests. There is a traditional norms handed down to us from our parents and grandparents not to do that. Hence, selling natural trees and their different parts to get income or profit is considered shameful among our community. However, currently, these norms and values have become declining and hence losing the power they had once upon a time in influencing people's behavior due to poverty, unemployment and the conversion of many people from indigenous religion to other religions such as Christianity and Muslims which do not give recognition for traditional beliefs.

The fourth informant also holds similar position with the third key informant regarding the current status and power of the local communities' indigenous institution in restricting the purpose for which natural forests have to be used.

*Informant 4:* Male, farmer, 47 years old. Especially, as people have become unable to sustain their life with the meager income that they get from agricultural activities, many of them are turning their face to natural forests to prepare charcoal, timber and other household furniture in order to get additional income. These activities are damaging the natural forest resources of this area currently. Unless some measures are taken by the community urgently, I fear this situation may result in destruction of this resource which or indigenous knowledge and norms survived it for many years.

iv. *Fluctuation of the use of natural forest species based on seasons*

Moreover, the local communities in the studied area use fluctuation of natural forest species use based on seasons. One of the informant interviewed described how the community had been fluctuating the use of plant species based on seasons as follows.

*Informant 4*: Male, 47 years old. Some trees are not cut down during winter or dry seasons because their capacity to regenerate is very low in dry season since there is shortage of water or rain. Of course, such practice is not only limited seasons but also applies to days in a week. For example, it is strictly forbidden to cut down a tree on Wednesday and Friday. Because it is believed that a tree cut down on these two specific days will decay instead of rejuvenating again. Thus, special care is being taken even today in this regard.

f) *Government policy support for the indigenous knowledge and institutions contributing to natural forest conservation in the study area*

This study also tried to investigate the extent to which the existing government policy on natural forest conservation recognizes and gives support for the local communities' indigenous knowledge and institutions in efforts made to protect natural forests from destruction. This objective aims at understanding how the formal government policy and the informal indigenous knowledge and institutions support each other on mutually beneficial and common goals. Identification of such issues is very important because natural forest conservation may not be realized without full participation of government and the community. The following table shows respondents' view on this issue.

*Table 7:* Respondents' perception on government support for indigenous knowledge and institutions forest conservation

| S/No. | Is there government support for indigenous knowledge and institutions forest conservation? | Frequency | % |
|---|---|---|---|
| 1 | Yes | 117 | 97.5 |
| 2 | No | 3 | 2.5 |
| | Total | 120 | 100 |

*Source: Source: 2015 Own field survey*

As table 7 shows, 117(97.5%) of the respondents responded that there is government policy recognition and supports for the community indigenous knowledge and institutions on natural forest resource conservation while 3(2.5%) of them said that there is no support. Those, who responded that there government support were also asked further question about in what ways the existing government policy supports their indigenous knowledge and institutions. These respondents forwarded the following different ways by which government supports the local communities' efforts to conserve the natural forest.

*Table 8:* Respondents' response about the mechanisms by which government support their indigenous knowledge and institutions of conserving natural forests

| S/No. | Mechanisms by which government supports indigenous knowledge and institutions forest conservation | Frequency | % |
|---|---|---|---|
| 1 | Awareness raising activities on natural forest conservation | 113 | 94.2 |
| 2 | Provision of various plants species seedlings for planting | 111 | 92.5 |
| 3 | Afforestation and reforestation activities | 116 | 96.7 |
| 4 | Introducing alternative energy sources not depended on forest | 97 | 80.8 |
| 5 | Creating alternative income generating sources not based on forest | 89 | 74.2 |
| | | 526* | 438* |

*Source: Source: 2015 Own field survey*

*N.B:* * The total number in table 9 is greater than the actual 120 sampled households because the respondents have given more than one response for this specific question. Similarly, the corresponding percentage to each response is calculated out of the 120 households interviewed for this study and its summation is greater than 100% due to more than one response given by respondents for the specific question.

As table 8 shows, the respondents identified the different mechanisms by which the existing government policy indirectly supports the local communities' indigenous knowledge and institutions of natural forest conservation. Accordingly, of the 117 responded that there is a government support, 113(94.2%) of them said awareness raising activities on natural forest conservation, 111(92.5%) provision of various plants species seedlings for planting, 116(96.7%) afforestation and reforestation activities, 97(80.8) introducing alternative energy sources not depended on forest and 89(74.2%) creating alternative income generating sources not based on forest are the various mechanisms through which existing government policy has been providing support for the communities indigenous knowledge and institutions.

The respondents and key informants argued that these activities support the indigenous knowledge and institutions of the local communities' effort to conserve and protect the natural forests from damage. However, both respondents and key informants have also revealed that the government is not undertaking these activities with the specific objective of promoting the local communities' indigenous knowledge and institutions rather we mean on its way it has been undertaking activities that augment the long existing community values for sustaining natural forests. Therefore, still many things are left in linking the formal activities of government and that of the local communities to ensure sustainable use of natural forest.

*g) Discussions*

This study attempts to investigate the local community perception about the benefits of natural forests, explore the meaning attached to natural forests by the local community, examine the indigenous institutions contributing to natural forest conservation in the study area, identify how the community classify and use different types of plant species of natural forests and the government policy support for the indigenous knowledge and institutions contributing to natural forest conservation.

From the findings it is understood that the studied communities have their own indigenous knowledge of classifying the various types of trees in their surrounding natural forest including the benefits they obtain from these resources. They know the name of each tree and its corresponding benefits.

They have also special meaning that they attach to forests. Their meaning for natural forest goes beyond the commonly held definition of forest mentioned in many literatures. For instance forest refers to Food and Agricultural Organization or FAO (2001) forest is "land with a tree crown cover (or equivalent stocking level) of more than 10% and an area of more than 0.5 hectare; the trees should be able to reach a minimum height of 5 meter at maturity in situ". FAO (2006) defined forest as a minimum land area of 0.05-1 ha with tree crown cover more than 10-30% and tree height of 2-5m at maturity. The communities in the studied area also accept the fact that forest refers to land area covered with various species of plants. However, their definition and meanings of forest goes beyond that. The respondents and the informants argued that forest is everything for them. It is "a source of life" for them because it is the source for food, water, clean air and shelter which are very crucial for the survival of human being and without which life is impossible.

As forests fulfill almost all of the basic things required for the survival of human being, the local communities in the study area protect forests from destruction through their various indigenous knowledge and institutions.

One of the mechanisms by which the local communities protect forests from destruction is through identification of intact grooves and trees from the ordinary one. Most of such groves and trees are those planted over places where ancestors were buried. These trees are never cut down for ordinary purposes by anybody else. Rather, they serve as sacred areas where rituals are exercised for the past many years to get reconciliation and blessings from ancestral ghosts as one of the informant described it. Trees like Qilxuu (ficus vasta), harbuu(ficus sur), Ejersa(prunus Africanum), Laaftoo(Acacia abyssinica) and Birbirsa(*Podocarpus procera)were considered as sacred trees.* Hence, they were worshiped and served *dhibaayyuu (drink offering)* by the devotees.

Moreover, the local communities in the studied area use fluctuation of natural forest species use based on seasons. Concerning this, some trees are not cut down during dry seasons because trees cut down during this season cannot regenerate. Similarly, trees are not cut down on specific days of a week such as Wednesday and Friday because trees cut down on these days are vulnerable to decay and being dried instead of rejuvenating.

The other mechanism by which the local communities in the study area conserve forests is through selective use of the various plant species. For instance, trees are not cut down for various purposes at their infant or young stage as it is believed that it cannot rejuvenate at this stage. Instead the matured, old and dried ones are used. Moreover, some trees are used for only special benefits such as medicinal purposes which do not involve the withdrawal or collecting much amount of that tree or its parts and hence reduces its vulnerability to extinction.

Apart from these, there are internalized informal norms handed down from generation to generation among the community to limit the purposes for which trees in natural forests have to be used. Regarding this, for instances, it is shame to use naturally endowed trees for commercial purposes which impose pressure over the trees and consequently more susceptible for destruction.

These indigenous knowledge and institutions have far reaching implication for the conservation of natural forests in general and the various types of trees in such areas. Hence, they have paramount importance in helping the community to live harmonious life with the natural forests in their surrounding since a long time. Even though natural forests had been diminished or eliminated from other parts of Ethiopia especially before the past two decades, the south western part of Ethiopia particularly the communities in this study area were able sustain their natural forests. As understood from this study, the indigenous knowledge and institution of these communities are secret behind the survival of natural forests in these areas. But the power of these traditional knowledge and institutions have become declining and hence unable to regulate the appropriate behaviors people should follow in interacting with their natural forests due to poverty, unemployment and the rejection of the traditional beliefs and its values.

## IV. Conclusions and Recommendations

### a) *Conclusion*

In this study, an attempt was made to investigate the local community perception about the benefits of natural forests, explore the meaning attached to natural forests by the local community, examine the indigenous institutions contributing to natural forest conservation in the study area, identify how the community classify and use different types of plant species in their surrounding natural forests and the government policy support for the indigenous knowledge and institutions contributing to natural forest conservation.

Accordingly, from the findings it is understood that the studied communities have special meaning and value for natural forests in their surroundings which goes beyond the commonly held definition of forest mentioned in many literatures. Generally, forest is considered as "a source of life" for these communities as it provides them with food, water, clean air and shelter which are very essential for the survival of human being. In other word, natural forest is a source of livelihood as it serves them for many agricultural and equipments.

As the natural forests are their sources of livelihood, the communities had been providing special care and protection for their natural forests through their indigenous knowledge and institutions. Informally internalized knowledge and norms that focuses on delineation of intact sacred groves and trees, selective use of plant species, fluctuation of the use of natural forest species based on seasons, limiting the amount of natural forest used and its purposes are the major indigenous knowledge and institutions serving this purpose. Though natural forests had been diminished seriously from other parts of Ethiopia before the past two decades, the south western part of Ethiopia particularly the communities in this study area were able sustain their natural forests. Theses indigenous knowledge and institution of these communities are secret behind the survival of natural forests in these areas.

However, the power of these indigenous knowledge and institutions in shaping people's interaction with their natural forest has been declining these days due to poverty, unemployment and the abandonment of indigenous knowledge, values and beliefs among many people as a consequences other religions influences.

Though the government has been making efforts to strength the local communities' indigenous knowledge and institutions with regards to natural forest conservation, still many things are left to be done in linking the formal government and the local communities' effort to ensure the sustainable use of these resources.

*b) Recommendations*

The following points are recommended based on the findings of the study to strengthen the already existing indigenous knowledge and institutions of the local communities with respect to natural forest conservation.

- The government has to continue its awareness raising education as well as community mobilization and participation in conservation of the existing natural forest and rehabilitation of the degraded areas through afforestation and reforestation program as these activities have significant contribution in supporting the already existing indigenous knowledge and institutions to ensure sustainable use of the natural forest in the study area.
- Though government has been undertaking various activities that support the indigenous knowledge and institutions of the local communities' efforts to conserve and protect the natural forests in the studied area, these activities are not integrated and coordinated with the local communities' knowledge and institutions. Therefore, it is better if government policies identify and include the local indigenous knowledge and institutions in their plan and activities to protect and better sustain the benefits from these resources as sustainable use of natural forest involves both government and community participation.
- It is also important to expand other alternative income generating activities for the local communities in order to reduce their currently increasing demand to use natural forests for commercial purposes to support the meager income obtained from agricultural activities.

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# News as a Commodity Vs. News as a Public Good: Adaptation Strategies of South African Newspapers in the Digital Era

By Sibonile Linda Khumalo
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*Abstract-* Drawing on labour process theory and Bourdieu‟s field theory, this study explores the challenges that newspapers face in maintaining their relevance to readers in an age where news has been de-commoditised and made readily available on the web. Empirically the study is based on four case studies of incidents where different newspapers were reported to the Press Ombudsman for inaccurate reporting in recent years. In-depth interviews were conducted with key informants from the selected cases. In addition to that, a key informant from the office of the Press Ombudsman was also interviewed to provide further insight into the effectiveness of the Press Code in regulating accuracy in news reporting as well as the challenges that newspapers are faced with in that regard. It is argued that the digitalisation of media increases the tension between the production of news as a public good vs. its delivery as a commodity that has to ensure profit. Media is an essential pillar of democratic South Africa as it provides news to ensure that citizens are informed about issues that concern them and have the ability to make decisions on matters of concern – i.e. a public good. It is therefore crucial that news be reported in an accurate and professional manner adhering to the standards set by thePress Code. Newspapers are faced with the challenge of ensuring a balance between producing news that is accurate and adheres to the set standards outlined in the Press Code while also ensuring that they remain profitable – i.e. news as a commodity.

*Keywords: labour process theory, news production, commoditisation, public good.*

*GJHSS-C Classification: FOR Code: 120304*

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*Keywords: labour process theory, news production, commoditisation, public good.*

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## Chapter One

### I. Introduction

To what extent does restructuring in the field of journalism impact on accurate news reporting? In 2012, Julius Malema took three newspapers to the Press Ombudsman for complaints of inaccurate reportage on him after they had reported inaccurately on the value of his property and his alleged imminent arrest. In this case the Press Ombudsman found in Malema's favour. As one of the key informants I interviewed for this study remarked: *They like going for Malema but they don"t check...*"[1]

Given the fact that the media, the print media in particular, is currently under fire, one might ask what goes wrong when newspapers fail to verify information and ensure accuracy prior to publishing news, such as in the case of Julius Malema mentioned here. To be sure, cases taken to the Press Ombudsman against newspapers" inaccurate reporting have increased over the years (Retief, 2002), raising concern over news quality in South African print media and opening up the media for further political attack. What are the reasons for this real or perceived decline in the quality of news reporting? It has been argued that the digitalization of news production is leading to the hollowing out of the media as one of the central pillars of democracy. Additionally, competitive pressures on the media and the subsequent commercialization of journalism have driven the standards of journalism down (McNair, 2009). In this study, I show how this is true to some extent but I argue that, in spite of these pressures, there is always room for newspapers to manoeuvre. Despite the pressures newspapers may be faced with in the production of news (structure), there are still means by which inaccurate reporting can be avoided (agency). I show the various approaches used by newspapers and by use of case studies from different newspapers, I show how newspapers can attempt to avoid the faults made. Even Rupert Murdoch (2005), given the high profile investigation of his newspaper in the United Kingdom, states that the digital changes taking place in

[1] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

newsrooms can be an opportunity to improve journalism and expand newspapers" reach. Thus newspapers can take proactive approaches to adapting to the digitalization of news and find means to benefit from technological developments as well as the use of online news sources and continue to maintain professionalism in news reporting.

This research is a continuation of previous work on the tension between profit and professionalism in print media and how the corporate restructuring of journalism impacts on news reporting in the South African print media (see Khumalo, 2011). This previous project was based on interviews and limited observation. It concluded that; restructuring of the newsroom has resulted in journalists being faced with more pressure in news production, given that fewer journalists and more juniors than seniors are being employed as a means of cutting costs. Furthermore, technological developments in the newsroom leads to journalists having to adapt to new media sources of news reporting and this has resulted in an increased reliance on the web at the expense of in-depth sources of information gathering. With pressure to produce news articles at greater speed, given availability of news from new media sources such as the internet and social media, newspapers have had to turn to online news reporting as well thus increasing journalists" workload. This has affected the quality of news as emphasis has become more on speed and reaching deadline as well as coming up with breaking news first as opposed to reporting more in-depth news that is given thoughtful analysis (Khumalo, 2011).

In this research I broaden these previous findings with more in-depth analyses of actual case studies. I explore the process of news production in detail, using recent cases of newspapers that have been taken to the Press Ombudsman for inaccurate news reporting. These case studies reveal that it is not just the restructuring taking place in newsrooms that is impacting on the quality of news. In addition to the consequences of restructuring, newspapers are faced with several other challenges not directly related to restructuring. These include; cases of experienced people leaving the journalism profession, inadequate training, sensationalism of news and disregard for the Press Code. As a result, maintaining the high standards of news production as set by the Press Code becomes a challenge given that the tension between maintaining professionalism in news reporting vs. keeping profits remains unsolved. However, as I show in the case studies below, the errors made by newspapers can be avoided. In sociological language: despite structural factors playing a role, there is room for agency. It is of utmost importance that these issues be addressed by the print media if it wants to avoid further attempts to put limitations on press freedom.

It is important to note that variations exist between newspapers. For instance, some newspapers are highly specialized with each journalist focusing on one specific beat while in other newsrooms a lot of multitasking takes place. Additionally, some newspapers say they have not yet experienced restructuring and that they are still to experience it, while other newspapers say they have gone past restructuring. It thus appears that restructuring is taking place at different periods for different newspapers.

This study is structured as follows: It starts out with a theoretical grounding of the research study with focus on journalism as a labour process and as a field. This is followed by the methodology chapter which outlines the qualitative method(s) and selection criteria used to collect data to tackle the research question. Chapters four and five go into detailed analysis of the research findings. This is in relation to; an understanding on how news is produced as a commodity with application of Labour process theory and how news is produced as a public good with an application of field theory. Chapter six goes on to look at specific case studies in which newspapers have been sent to the Press Ombudsman in recent years. These case studies demonstrate the tension between producing news for profit motives vs. the need to maintain professionalism. The study concludes with chapter seven which provides an overall outline of the challenges newspapers face as shown in the case studies. To end of, the study illustrates how newspapers have agency and the several steps that can be taken to attempt to avoid errors in news reporting.

# Chapter Two

## II. Journalism As A Labour Process And A Field

The case mentioned in the introduction regarding Julius Malema reporting three newspapers to the Press Ombudsman for inaccurate reporting illustrates a fundamental point discussed in this paper. It shows how news may be in the public interest, which alleged corruption committed by a public figure clearly is. However, news is also supposed to make money and bring in profits for news organizations, resulting in hasty decision to break a story before competitors. News is therefore both a public good and a commodity at the same time. Occasionally, the tension between the two may result in inaccurate reporting. In this chapter I theorise this tension by drawing on two sets of literature. In order to understand the production of news as a commodity, I draw on Marxist labour process theory. This theory is particularly appropriate, since it is interested in how the need to be profitable leads to various forms of workplace control over workers by managers, with a specific focus on technology. This perspective, however, has little to contribute to an understanding of the production of news as a public good. For this I turn to Pierre Bourdieu"s field theory, which analyses the "rules of the game" in various social institutions, such as the media or education. Both these theories have the advantage that a number of scholars have applied them to understanding how the restructuring of journalism impacts on news production.

*a) News as a Commodity vs. News as a Public good*

Tension exists between the need for newspapers to ensure that productivity is kept high and that profits are maintained, on the one hand, and the need to maintain professionalism in the reporting of news given that news is a public good which is needed for democracy on the other. Serving commercial interests primarily over producing news accurately to serve society could impact on news quality given that there may be pressure to publish quicker and publish news stories that sell. In the midst of this, quality checks may be lost thereby undermining the credibility of media as an essential pillar to democracy.

Champagne (2005) distinguishes between two types of press; one that is strictly dependent on the state and destined to serve it and the other that is constituted on the model of the for-profit commercial enterprise. Newspapers are economic enterprises directly subject to economic laws which often come into conflict with the imperatives of intellectual production; this presents a strong pressure within journalism. It is important to note that although media has the role to serve the state and inform citizens appropriately in a democratic society, profitability tends to impose strong constraints on journalistic production. The state has power of ensuring that media performs its role of informing citizenry and enforces measures to oversee the way media operates, as in the case of the Protection of State Information Bill. Should the Bill become law it will limit information that journalists can expose to the public as the Bill seeks to regulate the classification, protection and distribution of state information. Thus, the state would be able to regulate what state information the media can or cannot bring to the public eye. This notion of state power over the media can be justified by drawing on the Marxist critique of the media as a bourgeois institution which represents the interests of the ruling class in society.

The tension between making profits and maintaining professionalism is therefore a difficult one to resolve given that newspapers" profitability models are under strain from other immediate and freely available news sources. In the end newspapers face a challenge of ensuring professionalism in news reporting while still remaining profitable. As Patrick Champagne (2005) argues, a major contradiction within the operation of the journalistic field lies in that the journalistic practices that best conform to journalism ethical codes are often not profitable.

*b) News as a Commodity*

News is a commodity given that it is produced for consumption by the public and also with the intention of newspapers making profit from its production. News has to sell as newspaper corporations are in business, moreover with the goal of profit making. Newspapers" business model has been affected by the de-commoditisation of news content as it is offered for free on the internet. This has brought newspapers" profitability model under pressure as they have to strive to still remain in business.

As a result, more emphasis has being placed on the need to make profits thereby sacrificing quality in news reporting in some instances (McManus, 2009).

McManus (2009: 219) defines commercialization of news as "any action intended to boost profit that interferes with a journalist"s or news organization"s best effort to maximize public understanding of those issues and events that shape the community they claim to serve." As competition from other sources of news, primarily the immediacy of news offered freely on the internet, commercial interference has been on the rise. Newspapers thus compete to grab the attention of readers and to sell. As a result of this, more news is becoming sensationalized and made to sound interesting to readers, in the end accuracy is lost in some instances as I explore further in the following chapter. There is a focus on news that can sell to the public which leads to the "dumbing down" trend whereby newspapers report more on what they find appealing to readers such as reporting more on celebrities and an overemphasis on the personal lives of politicians. News organizations may be faced with an additional pressure to avoid negatively reporting on large advertisers that bring in a lot of revenue (McManus, 2009). This results in a greater possibility of newspapers" accuracy being compromised by the need to continue bringing in revenue to their organizations.

Newsrooms have had to adapt to the changes in news production which have taken place primarily as a result of technological developments leading to a need to readjust the business model of news production. Consequently, newspapers have had to employ means of cost cutting to deal with the financial pressures facing print media. Newsroom restructuring was explored in detail in part one of this study and the findings showed that cost cutting has been a strategy to ensure that newspapers continue to maintain profitable production (Khumalo, 2011). Thus costs have been cut by reducing the number of staff in most newsrooms. There has also been a tendency to employ more juniors than seniors (as seniors are more expensive to hire and have been found to be less competent in the operation of technological developments in newsrooms). Some newsrooms make use of freelancers who are only employed on a need basis and paid according to the number of news stories they produce thus offering cost effectiveness. Convergence/synergy is another means by which newspapers cut costs in news production. Convergence involves the production of news content for multiple platforms; information is gathered in a content pool and then disseminated in a variety of platforms within the newspaper corporation such as other newspapers within the group as well as the internet, radio, mobile, video and television.

In the next section I will explore how news is not only a commodity produced for the sake of making money but it also has to be in the public interest and adhere to the required standards of professional news reporting.

### *c) News as a Public good*

Journalists play the role of being watchdogs on behalf of citizenry hence public interest has to be kept in mind in the production of news. As is argued by Des Freedman (2010) news has never been an ordinary commodity, news has a special status in facilitating a public sphere by providing the public with information to participate in a democratic life. High standards of news reporting should be maintained so that the public is accurately informed and can be able to make well informed decisions. As McManus (2009) argues, the more newspapers prioritize on profit making at the expense of professionalism in news reporting, then the less valuable news becomes as a resource for citizens. News is thus a public good that contributes to the pillars of democracy and it is of importance that it be produced professionally and ethically.

News cannot simply be consumed in any form; certain standards have to be observed. News has to be in the public interest, as media plays a crucial role in ensuring that citizens are well informed. The importance lies not just in how news is produced-to sell, but also on how it is received by the audience. Thus, standards of news reporting are set by the South African Press Code upon which newspapers are to adhere to ensure that news is produced in a manner that is reputable. The Press Code is the ethical Code to ensure the practice of responsible journalism in South Africa. If news is defective, there are serious ethical consequences for newspapers and ultimately implications for democracy. Because print media has enormous influence, it is of vital importance that journalism be practiced in an accountable and responsible way (Retief, 2002).

Newspapers have built into the process of news production systems to check news stories and verify that news has been reported accurately and that it adheres to the standards that are set by the South African Press Code. News stories go through various checking processes prior to being finalized for print. News editors, editors and subeditors go through the stories written by journalists to verify that the stories have been written appropriately and accurately. In addition to this process, some newspapers have an accuracy form which is meant to be filled in by every journalist that writes a news story. In this form, journalists check that they have reported news accurately and followed all standards set by the Press Code. I further explore the means to ensure accuracy in news production in detail in the next chapter. To sum up, these checking processes are in place to ensure that news as a public good is produced in the best way possible as is essential in a democratic society.

Labour process theory shows how news is produced in such a way as to keep productivity high and ensure profit generation as outlined below. Additionally, I draw on Bourdieu"s field theory to understand how news is also a public good which has to be produced in such a way that maintains levels of professionalism. I will now go on to look at each theory in turn:

The labour process theory shows how news is a commodity as it is produced for sale with the need to make profits. Labour process theory further illustrates how management seeks to ensure maximum productivity so as to maintain profits. Newspapers are corporations in business thus news is produced with the aim to sell and continue to bring in revenue to news organizations. Management seeks to control how work is organized and to cut costs where possible to achieve profitability. Some structuralist strands of labour process theory run the risk of not recognising workers as capable agents in their work. Bourdieu"s field theory addresses this gap by showing that workers can exercise agency in production. In addition, field theory illustrates how the process of news production is beyond commodity production as newspapers do not only seek to acquire economic capital in the form of revenue, but also importantly seek to obtain cultural capital in the form of original, well written news stories and publishing news accurately which keeps their newspaper standards high. Hence, news is also a public good to be produced with adherence to standards set by the Press Code and journalists can feel a sense of satisfaction in serving the public in producing news stories.

### *d) Theories*

#### i. *Braverman's Labour Process Theory*

Labour process theory is relevant to this research as it specifically deals with the relationship between technology and labour. There has been a revival in this theory in studies of the media and other service industries subjected to technological change, which makes it relevant to my study. Labour process theory relates to the impact of technology on work, in this case print media. It is important to apply labour process theory to the production of news as it helps to understand the changes taking place in newsrooms as a result of technological developments especially the internet and the effects thereof. A return to Harry Braverman‟s (1976) work on the labour process has become more prominent as processes that were applicable in manufacturing are now being utilised to mechanise and standardise service work, such as turning personalised customer advice into pre-coded steps that are subjected to broken and allocated to call centre operators. Also, business processes and administration are increasingly outsourced to dedicated agencies that often perform these functions off-shore and at lower wage rates. In addition, professional work is increasingly being subjected to deskilling as well as increased casualization of labour, such as the use of freelancers in the journalism profession.

Braverman (1976) predicted that the manufacturing working class would become deskilled over time, since Taylorist scientific management and Fordist mass production would lead to them merely repeating tasks designed by industrial engineers. Mass production, according to Braverman, depleted the craft tradition of production that had existed before the rise of factories. Breaking the production process down into pre-determined tasks separates out the conception of work from its execution, leading to deskilled, alienated labour. Assembly line technology, as invented by Henry Ford, played a key factor in this. Braverman was severely criticised for not recognising the agency of workers and the fact that they often resisted such deskilling (Edwards, 1979, Friedman, 1977; Burawoy, 1985). As pointed out above, the standardisation of work in the service economy has led to renewed interest in Braverman‟s work. Interestingly enough, Henrik Ornebring (2010) recently made use of Harry Braverman‟s labour process theory to explore the relationship between technology and labour in the production of news. In this research project, I draw on his study broadly to understand how the restructuring taking place in the field of journalism may affect news quality.

The critique of Braverman as too structuralist has to be taken seriously though. For this reason I also turn to Pierre Bourdieu‟s field theory. This theory provides specific insight into the relationship between media and society and helps to understand structural changes that impact on the news production process. Bourdieu‟s field theory shows that workers have agency in the production process, which Braverman‟s version of labour process theory underplays. Thus journalists can have autonomy in producing news stories for instance by coming up with their own story ideas and are not necessarily coerced and/or exploited in producing news stories. Moreover, applying field theory to the labour process of news production aids one to understand news not just as a commodity, but also as a public good to be professionally produced to serve and inform society.

Labour process theory is concerned with how a workforce‟s labour power is directed towards the production of commodities that are sold in order to make profit. Labour process theory is often applied to manual labour; this study applies the labour process theory to white collar work and shows how the labour process can also be about news production. Journalists are different from manual workers in the sense that the system of control in journalistic work is only partly concerned with the volume or speed of their output. As David Murphy (1991) argues, journalists have an additional major concern to do with the content of what they produce. This relates back to the discussion above which shows that news is a public good that has to be produced in a set manner adhering to the standards of news reporting set by the Press Code so as to ensure that the public is well informed. It should be noted that although news is a commodity that is produced for the public, it is not an ordinary commodity. News is not merely produced for commercial purposes; media is central to the pillars of democracy and has to ensure that it serves society by reporting news truthfully, accurately and fairly. In addition to what labour process theory stipulates, news is more than just a tangible product. The production of news involves knowledge work, given that journalism is distinguishable from any ordinary commodity by the ethical requirements and standards to be adhered to in the production of news content.

A renewed interest in Marxist labour process theory followed after the publication of Harry Braverman‟s (1976) work, notably the work of theorists such as Michael Burawoy (1985) and Paul Thompson (1989).Major themes that emerge from the labour process theory literature are; the importance of the separation of conception and execution of labour, increased differentiation of the labour process, the use of technology to increase productivity and deskilling (Ornebring, 2010). I will proceed to explain these themes below after which I will examine their application to my research project.

According to Henrik Ornebring (2010), in the work of journalists, conception involves planning the content of the newspaper, what to print as well as gathering the news while execution involves the actual writing and information gathering. These processes have been rigidly separated since the industrialization of the press, there has been gradual disconnection of the technology of printing from the actual news gathering labour. This is visible in the newsroom whereby there is separate staff for news reporting, mainly journalists and news editors and also production staff that are responsible for the physical production of the newspaper i.e. preparing the paper for print. Also, journalists may be involved in the processes of news gathering and writing of news stories, however, they may not always partake in the finalizing of news stories for print. As the case studies explored in this study show, journalists‟ stories can get changed along the editing process and they may not always be aware of this until the newspaper goes to print. According to Braverman, this form of separation of the conception and execution of labour is a form of control. He saw workers as becoming deskilled by performing repetitive tasks and not being part of the mental aspect of planning work (Braverman, 1976).

With regards to the increased differentiation of the labour process, tasks have become increasingly differentiated in the newsroom with the development of more journalism beats such as online news staff, sports reporter, justice reporter, international correspondent, crime reporter so as to enhance the process of news production. Increased differentiation of tasks in the newsroom aids in keeping productivity high. Other journalist support staff such as photographers, graphic designers also exist; however, journalists are in some cases required to perform these tasks in addition to news reporting. Journalists are thus expected to have technical skills and as Henrick Ornebring (2010) argues from Braverman"s perspective, technology becomes a tool that allows management to implement organizational changes aimed at making journalistic labour more cost effective and more easily controlled.

Moreover, labour process theory looks at how technology is used to increase productivity in the workplace. Newsrooms are now increasingly dependent on technology for their work; technological advancements such as the internet and mobile phones are aiding journalists to deal with the pressure in the newsroom for instance they can now receive documents via fax and email as well as contact their sources without having to leave the newsroom. Henrick Ornebring (2010) argues that the introduction of new technologies in the production of news has worked to establish a discourse of speed as speed has become a primary measure of competitive success in the news industry. Journalists are increasingly focusing on producing news quicker and being able to break news stories first. Technological developments in the newsroom have additionally led to the introduction of more subtle forms of control by management and ensuring a quicker and more effective way of monitoring the work of journalists.

Labour process theory also looks at the aspect of deskilling; Braverman argues that there is increased deskilling of the labour force as there is increased use of technology in the workplace and workers perform repetitive and less challenging tasks; there is loss of integrated skills with more reliance on technology. By deskilling, production costs are cut and workers lose their autonomy, in addition, there is more control by management as workers do not have direct engagement in the production process (Braverman, 1976). Henrik Ornebring (2010) argues that as journalists become more skilled in digital production techniques, there is the danger of them finding less use for their news-gathering and collating skills.

As pointed out above, Braverman has been criticised for being too structuralist and for not taking workers" agency into account. Braverman (1976) argued that management had the objective to maximise their control over the labour process as well as to minimize worker"s autonomy. Braverman"s theory failed to recognise workers as capable agents to their work set structures. I critique Braverman"s argument, given that workers still have autonomy. In the production of news, journalists have a sense of agency for instance they can hold responsibility in coming up with story ideas and independently working on news stories. Similarly, Knights and Willmott (1988) argue that Braverman ignores the variability of worker resistance as some groups in the workplace resist more than others and some changes can be resisted more than others. Thus there is not a straightforward relationship between workers and management. It has further been argued that Braverman"s theory portrays management as omniscient and employees as infinitely malleable (Knights and Willmott, 1988). I argue and I show in this study that workers, in this case journalists, have a sense of agency and can be actively involved in the news production process with management not necessarily having to detect tasks for them. Although, on some occasions, management directs news stories for juniors to work on, journalists who are able to come up with their own story ideas and work independently and professionally are valued in the newsroom. The labour process is thus not always about deskilling and the degradation of work.

I now turn to Michael Burawoy"s (1979; 1985) work in further expanding on this critique of Braverman"s deskilling thesis. Burawoy argued that workers had a certain level of autonomy on the shop floor which allowed them to invest in labour through constituting work as a game. Burawoy referred to this game as „making out" and by participating in this game, workers cooperated with management in producing surplus and they consented to their exploitation (Burawoy, 1979). Both Burawoy and Bourdieu analyse this process of game playing as consisting of workers defending the game"s rules and by so doing, workers contribute to producing surplus. In addition to this, they argue that participating in constituting work as a game conceals the relations of production between capital and labour (Burawoy, 2012). Thus, surplus labour is obscured and secured through obtaining consent or cooperation from workers. When workers have less autonomy in production, they are likely to view the nature of their work as exploitative. Bourdieu states that the less autonomy a worker has the less room the worker has for meaningful investment in labour and the more likely workers will see themselves as exploited (Burawoy, 2012).

Although Burawoy"s labour process theory is based on experiences on the shop floor, it is crucial to understanding consent in the relations of production.

For instance, in the newsroom, journalists know what is expected of them in the production of news, they can thus go out and gather information and come up with breaking stories. This can occur without editors detecting to the journalists to do as such. Journalists have satisfaction after having covered well researched and well written news stories. Thus by aiming to reach targets and performing to good standards of reporting they consent to what is expected of them in the production of news.

It could further be argued that by journalists completing among themselves in the newsroom and also by different newspapers competing in breaking news they are participating in playing a game which ultimately increases productivity in the production of news. The competition to have a front page story for instance could boost journalists to work hard to try to produce better than other fellow journalists. In the process of doing this, productivity in the newsroom is being kept high and journalists do not feel exploited, they may instead feel a sense of satisfaction for coming up with good news stories and meeting their set targets.

Burawoy‟s labour process theory brings an understanding to how journalists consent to the process of news production and participate in the means to keep productivity high and maintain high standards in news reporting. This theory states that the interests of capital and labour have to be coordinated in order to ensure the simultaneous obscuring and securing of surplus value which management seeks to achieve (Burawoy, 1979). Thus in order to ensure the survival of newspapers obtaining maximum output and maintaining profits is essential, it is also essential to obtain consent and cooperation from the workers in the production process as their resistance could affect the production process. Understanding the relationship between management and journalists enables one to understand the labour process of news production better. Burawoy speaks of the internal labour market as a contributor to the obscuring and securing of surplus value, it promotes mobility within firms and dissolves tensions between workers and management (Burawoy, 1979). Worker benefits and upward mobility could be offered to workers and seniority rewarded as means to co-ordinate the interests of capitalist and labourers in the generation of surplus value. In most newsrooms, journalists are now able to move from junior to senior quicker than before and seniors have much more autonomy and responsibilities in news production.

As is visible in the production of news, the labour process does not always consist of deskilling and labour degradation. Journalists can have responsible autonomy in news production. Friedman (1977) spoke about two types of strategies used by management to exercise authority over workers, namely direct control and responsible autonomy. Direct control consists of coercive threats, close supervision as well as minimizing individual worker responsibility. On the other hand, responsible autonomy gives workers flexibility and encourages them to adapt to changing situations in a manner that is beneficial to the corporation. Under responsible autonomy, workers are given status, authority and responsibility. I show in this study how journalists have responsible autonomy in news production and can resist managerial control as I further discuss in chapter four. Journalists can resist the set structure of management setting tasks for them by coming up with their own story ideas and working through them independently thereby getting directly involved in the production process.

David Murphy (1991) looks specifically at the labour process of journalism and argues that control by management over journalistic work is achieved primarily through the permeation of the work relationship by a market ethos. As a result, journalists‟ desire to succeed in the profession of journalism leads them to comply with the requirements and demands of their jobs and strive to meet their targets as required. The ideology of marketing one‟s work and one‟s self is built into the ideology of the job. Journalists thus strive not only to produce news stories but to ensure that the news stories are marketable to the public, there is thus need to have a sense of the market in news at any given time. Additionally, as Murphy argues, journalists are made aware that their reputation is only as good as their last good story (Murphy, 1991: 146). Thus, management employs the strategy of exposing journalists directly to the rigours of the market which eliminates the need for bureaucratic control. Journalists hence become aware of what is expected of them and they strive to work hard in order to produce good stories and succeed within the system.

Paul Thompson argues that the labour process is constantly being transformed as a result of the pressures to accumulate capital (Spencer, 2000). This argument is applicable to the labour process of news production which as this research project bases its foundation from, is constantly being restructured due to financial pressures and other factors such as competition from other news sources such as online and television news and less people relying on print media as a source of news. Thompson and Smith (2010) similarly argue that there is necessity to constantly renew the forces of production and the skills of labour to expand the profit rate and to ensure competitive accumulation of capital; this in turn results in a cheapening of labour costs and creation of a complex labour force structure (Thompson and Smith, 2010).

Thus, labour process theory shows us that news is a commodity that is produced in such a way as to obtain maximum productivity so as to ensure that profits are made. Labour process theory further shows how technology is essential in the newsroom so as to increase productivity. Additionally, management control is essential in the labour process to ensure that journalists produce to the required standards. Control in the newsroom is not of a coercive nature, it is more subtle and consists of responsible autonomy as journalists can actively partake in coming up with news stories and gathering information for stories without direct supervision. However, management (editors) are still in control of the news content that finally gets published in the newspaper.

Nevertheless, labour process theory is less equipped to explain how news is not just produced as any other ordinary tangible commodity with the aim to sell and make profits, but as something that is seen as a public good. Bourdieu‟s field theory is essential in this regard as it shows how news is beyond just an ordinary commodity; it is also a public good which is essential to democratic society as has been pointed out. Therefore, I now turn to Bourdieu‟s field theory to understand news as a public good as well as to understand the agency that newspapers have in news production.

ii *Bourdieu's Field Theory*

Pierre Bourdieu defines the field as a setting in which agents and their social positions are located and in which their interrelations are determined by distribution of different kinds of capital (Hesmondhalgh, 2006). Of particular significance in the production of news is economic and cultural capital. The requirements of economic capital involve circulation, advertising revenue and marketing. Cultural capital, on the other hand, involves production of original stories, uncovering scandal or influencing the social and political agenda. Forms of economic and cultural capital can reinforce each other in the production of news; an original story can push up circulation and strengthen economic capital. However, it is important to note that the imperative to sell as many copies as possible tends to weaken the cultural in relation to the requirements of the economic (Philips et al., 2010). This relates back to the tension between profit and professionalism which was explored in part one of this project. The need to sell newspapers and make profit tends to clash with that of maintaining professionalism and high standards in news reporting.

Each field has its own rules of operation by which agents in the field operate on. The rules of the game tend not to be questioned; however, these rules can be changed by agent‟s actions in their spaces of possibilities (Benson and Neveu, 2005). Journalism as field has its set of rules in terms of the process of news productions, expectations to be met and ethical standards to be adhered to. Failure to adhere to the rules of news production and produce news accurately has consequences for newspapers which can be faced with penalties and this may affect newspapers‟ reputation and impact on media‟s credibility. I show in this paper how the formal rules of the field of journalism can be altered by newspapers as Bourdieu‟s field theory shows how agents in a field can attempt to change the rules of the game to their own benefit. There is conflict between the formal rules of the field as set by the Press Code and the informal rules which enable newspapers to maintain high profitability and continue to produce effectively while undergoing financial pressures, competition from other news sources and attempting to stay relevant amongst all other sources of news. The formal rules of news production get altered by newspaper corporations in an age whereby news is available for free on the web yet newspapers still have to remain in business and continue to produce and sell news to the public.

A number of authors, such as James Campton, Paul Benedetti (2010), Rodney Benson and Erik Neveu (2005) and Natalie Fenton (2010) use Bourdieu‟s field theory to explore the functioning of journalism and to analyze the structural changes taking place within the newsroom. Bourdieu held that journalism is a weakly autonomous field which is structured on the basis of opposition between two poles namely; those independent of state power, political and economic power and secondly those dependent on these powers and commercial powers (Bourdieu, 2005 as cited in Fenton, 2010). Within the field of journalism, cultural capital (the ability to define and influence events) is prized, thus newspapers are keen to provide the appearance of independence. Journalism is losing more of its autonomy as economic constraints are increasingly weighing on production due to the decline in advertising and migration of readers to new media news sources resulting in employing means of cost cutting in the newsroom (Fenton, 2010). Patrick Champagne (2005) further states that journalism‟s autonomy is always under threat as news production is strongly detected by the political and economic conditions in which it is organized.

To conclude this chapter, it is important to take note that as news is both a commodity that needs to be sold in order to make profit for newspaper it is also a public good. As media is one of the central pillars of democracy, it is crucial that news be produced in an ethical and professional manner to serve society. There remains a tension between the profit motive and the need to keep news professional and adhere to the standards set by the South African Press Code. I draw on labour process theories and field theory as discussed in this chapter to explain my research findings in the chapters below.

## Chapter Three

## III. Methodology

*a) Case studies*

I used the case study approach in order to understand the extent to which restructuring impacts on the quality of news. The case study approach is descriptive in nature and can provide rich information about particular situations or contexts (Blanche, 2008). This approach is of relevance to my research as I aimed to explain how and why a social phenomenon works namely the process of news production and the effects that restructuring as a result of increased technological use has brought to the quality of news produced. I chose the case study approach to answer my research question as it allowed me to obtain a rich description by looking into detail at each of the case studies selected to answer the research question. By broadly studying each of the case studies, I had the ability to obtain a broader understanding with regards to the restructuring taking place in newsrooms and other factors impacting on the diminishing quality of news in South African print media.

Cases where print media in South Africa published stories that are biased, lack facts, validity and do not make use of verifiable and legitimate sources as defined by the Press Code were explored. Recent cases whereby newspapers had been sent to the Press Ombudsman for inaccurate news reporting were selected. Tim May (2011) states that a case may be selected because of the fact that its analysis will reveal conclusions that can be taken as representative of a wider class of cases. From the cases that were selected, I was able to gain a better understanding of the faults or errors made by newspapers and how some of these may be related to the consequences of restructuring that are taking place within print media at large. A total of four case studies were used for this research.

The cases I used for this research highlight the errors that newspapers occasionally make which affect the quality of news. I used multiple cases so as to obtain more in- depth findings to understand the challenges in news production as well as to enable comparison between cases (Yin, 2009). Moreover, Merriam (2009) states that the more cases included in a study, the greater the variation across the cases and the more compelling an interpretation is likely to be.

Case studies enable intensive investigation of the variables being examined, thus it was useful to employ case studies to gather the research data (Mouton and Babbie, 2001).The case study method gave me the further advantage of obtaining an extensive and in-depth understanding of the labour process in journalism. Tim May (2011) sees the use of case studies as being useful in contributing to some knowledge through theorization. This case study research will thus make a contribution to theory on how the news production process has been impacted by means of restructuring in the newsroom primarily as a result of technological developments and the sort of challenges that journalists are faced with in news production.

Case studies have the advantage of involving various sources of data namely observation, interviews and documents. I used these sources of data to obtain more in-depth information as I discuss in the following section. The research design implemented the process of triangulation .Data triangulation was incorporated by using a variety of data sources (reporters, editors, a key informant from the Press Ombudsman office, documents and conducting observations) in order to obtain the most reliable and objective results possible.

*b) In-depth interviews*

In-depth interviews are an essential source of case study information (Yin, 2009). Seven in-depth semi structured interviews were conducted to obtain the research data. Six interviews were conducted with editors and journalists from the daily and weekly newspapers selected in the case studies which demonstrate incidents of inaccurate news reporting by newspapers. An in-depth interview with one key informant from the office of the Press Ombudsman was also conducted to obtain a better understanding of the cases selected and the factors involved in inaccurate news reporting as well as to understand the procedure of dealing with cases of inaccurate reporting sent to the Press Ombudsman. From this interview, I was able to better understand the measures in place to address issues of lapse in the quality of news and their effectiveness. The information obtained from the semi-structured interviews with editors, journalists and from the office of the Press Ombudsman was interpreted. Thereafter, themes were constructed from the interview findings and the data was analysed as shown in the following chapters. Throughout the research process, the primary goal was to remain as objective as possible (Kirk and Miller, 1986).

I was unable to conduct the interviews with the complainants involved in the selected cases as had been planned in the research proposal. This was because of the difficulty in reaching the complainants from the cases selected which all involve high profile people. I was able to make up for this limitation by making use of the available full rulings on all the cases as provided on the website of the Press Ombudsman.

*c) Observation and use of documents*

I was able to conduct non participant observation in two newsrooms that I gained access to during some of the interview sessions held. This enabled me as the researcher to access information from the natural setting i.e. the newsroom (Yin, 2009). Additionally, I was taken around a detailed tour in one of the newsrooms and I was able to observe and gain a better understanding of the structure of the newsroom and the processes involved in news production. The Information that I obtained from the observations conducted was added to that from the interviews to obtain more depth and better understanding of the context being studied. In addition to conducting observations, I also made use of documents namely newspaper articles and the records of the rulings on the Press Ombudsman website. Use of documents was essential in helping me validate and amplify evidence from the interviews and observations I carried out (Yin, 2009). Tim May (2011) substantiates this by stating that multiple methods are essential to case study research to enable the obtaining of rich descriptions as there is maximum confrontation through various mechanisms between the researcher and the field of study.

*d) Selection*

Tim May establishes significance in asking the question "what is this case of" when conducting case study research (May, 2011:230), the defining choices in case study research are whether, when and how to bound the case. I used three of the cases I selected as possible cases in the research proposal. One additional case that had not been selected in the proposal was added to these during the data collection phase (Mathews Phosa and the ANC vs. City Press). The four cases were selected according to availability of respondents (journalists and editors from each of the selected newspapers) to interview. The media organizations selected are all located in Johannesburg, South Africa.

The cases selected demonstrate lapse of quality control in different newspaper publications and by studying them broadly, I was able to understand the link between restructuring taking place in newsrooms and the decline in news quality. I selected more recent cases that were referred to the Press Ombudsman and I attempted to ensure representativeness of cases from different newspaper publications (both daily and weekly newspapers were selected). In each of the cases that I explored I focused on whether the faults made related to restructuring or other factors and if these errors could have been avoided. The selected cases further illustrate the tension between news as a public good vs. the need for news to be profitable and how prioritising the profit motive and not adequately checking news for accuracy could occasionally result in inaccurate reporting. This will be explored further in the following chapters.

*e) Ethics*

To ensure that my research is ethical, I made sure that all participants interviewed understood that their participation in the study was voluntary. Prior to beginning each interview, participants were informed that they were free to decline to continue with the interview at any time and that there would not be any negative repercussions for doing so. Prior to recording during the interview sessions, participants were asked for their consent to make sure that all data was collected ethically. Additionally, participants interviewed were assured that their identities would not be revealed in the write up of the research. I explained to the participants that the information that they gave me would only be publicized in the context of academic reporting and nowhere else. (Babbie and Mouton, 2001) Consent forms were given to each participant to sign prior to each interview session conducted. A sample copy of this form is attached in the appendix.

# Chapter Four

## IV. The Production of News as a Commodity

*a) A typical day in the newsroom*

A day in the newsroom typically begins with an early morning session between journalists and news editors. During this session, news editors brainstorm and discuss with journalists the stories they are going to be working on and what direction to take with the news stories for the next newspaper edition. Journalists can suggest story ideas to the news editors who can accept them, dismiss them or advise on which direction the stories should take.

A story diary meeting is held at 11am,2[2] in this meeting, news editors meet and discuss the big news stories for the day. At this stage, news editors consult journalists to inform them of any changes or additions to news stories as discussed in the diary meeting. For instance, news editors can decide to assign two journalists to a big story which may have been selected as one of the big stories of the day and may possibly need more focus. Journalists spend most of the day gathering information for news stories. This involves contacting or meeting specific news sources for information and making follow ups for the stories they are working on. Journalists also have to ensure that enough sources have being consulted to verify the accuracy of the story and also ensuring that a balanced story is produced.

The writing up of news stories has to be done in time for the deadline upon which journalists send their written news stories to the specific section editors. News stories are submitted via an online database to the specific editors to check the content and style of writing in the news stories. Different section editors exist in newsrooms and usually consist of sports editors, business editors and political editors depending on the newspaper. The various section editors liaise with the editor of the newspaper and assess the news stories submitted by the journalists. News stories are checked for accuracy. At this stage, journalists can be contacted for clarity on their stories or to revise their news stories.

[2] The times provided for conducting various news production tasks in the description below are merely a guideline as newspapers may differ.

Production staff is the staff that physically produces the newspaper. They begin their duties in the newsroom at 3pm. At this stage, a meeting is held with the production staff to discuss a page plan to show how many pages the newspaper will have and the advertising for the following day. A decision is made as to what the strongest story of the day is and the positioning of each news story. Additionally photographic editors select the appropriate pictures to go with news stories.

The subbing and layout process takes place after the meeting held at 3pm. Once news editors are satisfied with the content of news stories, the next process would be to send the stories to the subeditors. Layout subeditors layout the stories on the page while copy subeditors check grammar on news stories, write headlines and ensure that news stories are written in the appropriate writing style of the newspaper. Subeditors can rewrite unclear parts of news stories or completely reconstruct them should they see need to. In some newspapers, a revised sub then looks at the copy to make sure that there are no further mistakes. Subs hence have the duty to ensure that news is presentable and marketable as a product (Murphy, 1991). The editor is the final eye of the newspaper and can make changes if he/she sees fit before the paper gets printed.

In addition to the production of the print copy of the newspaper, there also occurs production of news online. Given the developments of the internet, a major shift has arisen in news production, as the internet has become a major source of news providing immediacy to readers. This has meant that newspapers have had to adopt and produce news both for print and online. Newspapers are under pressure to constantly break news on their websites as well as to provide Facebook and Twitter feeds on current news. Some newspapers have separate staff for the production of online news staff while in other newspapers, journalists are expected to multitask and ensure that they also focus on producing news for the newspaper website as well as social media.

The news production process described above is typical for daily newspapers. Weekly newspapers would differ in the sense that more analysis is given to news stories thus more time is given to produce news stories. However, weekly newspapers, similar to daily newspapers, also have to constantly produce news stories on their websites as well as social media.

In the following section I will go on to discuss themes obtained from my research interviews that are directly linked to the restructuring taking place within newsrooms. Newspapers face competition from the immediacy and free news provided on the internet. As a result, their profitability model is threatened as they lose some readers and advertisers to the internet. As newspapers are in business they need to produce news in order to sell and make profits, they thus strategize to ensure that they continue to keep productivity high while cutting costs where possible in the newsroom. By restructuring, newsrooms attempt to adapt to the digitalization of news and strive to stay relevant and keep producing news profitably. The themes discussed in the following chapter draw attention to the production of news as a commodity.

*b) Restructuring*

For purposes of this project, restructuring is defined as; changes made in the structure and operation of an organization (in this case the newsroom). The aim is to adapt the newsroom to the ever changing information age such as online news sources while still maintaining profitability. Technological developments primarily the internet have brought about fundamental changes to the process of news production, the structure of the newsroom as well as transformation of the industry as a whole. The internet is a significant factor in the restructuring taking place within the news industry. Newspapers are adjusting their working practices in response to the developments brought about by the internet. Additionally, changes are occurring within newspapers as a result of new commercial pressures in a far more competitive media environment (Philips, 2010).

The internet has become a source of news that offers immediacy and offers news that is readily available thus newspapers have had to strive to still remain relevant. This has brought about a challenge to newspapers as their means to maintain profitability has been shaken. As a response to these changes in news production and in order for newspapers to deal with the pressures that they are faced with, newsrooms have undergone means of restructuring to adapt. These means of restructuring were explored in detail in part one of this study and include; cutting down staff, juniorisation, use of convergence/synergy, increased use of technology in newsrooms, use of freelancers and use of news agencies (Khumalo, 2011).

In the following section, I discuss the themes that are directly linked to restructuring that were gathered from the interviews conducted with key informants. These are namely: The decline in print media as the main source of news, Pressure in news production, less staff, use of more juniors in newsrooms/juniorisation, increased use of technology, Use of News agencies and freelancers and increased management control vs. autonomy of journalists.

This chapter focuses on how news is produced as a commodity. Reference to the labour process theory which is of relevance to explaining news as a commodity will be made. I will make use of the following concepts from the labour process theory to explain the findings below; increased use of technology in production, increasing productivity and the need to make profits, deskilling, separation of conception and execution of labour, managerial control and worker autonomy. These concepts illustrate the need for work to be as productive as possible, with management monitoring production and ensuring that costs are cut where possible with the objective being the need to keep profits high. Within the profession of journalism, there is the need to get the most out of journalists and to ensure that they each meet their targets in news production and abide by the standards set by their newspaper. In the production of news, technology such as mobile phones and the internet are used to increase productivity and help journalists to better manage the pressure in news production. Cutting costs for instance by hiring less staff and more juniors than seniors as discussed below is a means to lower production costs with the aim of achieving the profit motive.

*c) The decline in print media as the main source of news*

A major challenge faced by newspapers is that of staying relevant in an era where its primary product, news has become increasingly digitalized. This has resulted in the migration of readers to more immediate news sources that have been brought about by technological developments. This shows the contradictions in the labour process theory. While technological developments in the newsroom are beneficial in enhancing quicker production, the internet also has negative repercussions to news production. The internet has brought about challenges to the news production model as newspapers now struggle to stay relevant given that they have to compete with more immediate news sources. While striving to stay in business, newspapers thus have to adapt and come up with an online business model that guarantees profit making.

*One key informant held:*

"*When I started, newspapers were still the key means of getting information. Production of news was different; we are now in a completely different world with windows, desktop and Mac publishing all of which have changed our universe completely.*" [3]

*Another key informant stated that:*

*"When I started, print media had a very safe and secure space in the landscape. This has been significantly changed by the advent of online media. There has been quite a significant concern whether online news websites would eventually take the place of newspapers because of the immediacy."* [4]

Berkowitz (2009) argues that journalists will never control the flow of information the way they did as a media environment in which only few voices had the opportunity to be heard and only with the permission of a media gatekeeper, is gone for good. Print media faces the challenge of reporting stories that would have already been reported on several immediate news platforms by the time newspaper(s) are published. As a result, there has had to be re-purposing of how newspapers project stories and the need to bring in new angles to what has already been reported on other news sources. It is thus essential for newspapers to move to a space of analysis and produce in-depth news stories to continue being relevant to readers.

As a result of the decline of advertising and circulation faced by newspapers, there has been need to readjust the print media business model. As was gathered in some of the interviews held, a number of newspapers have moved their news content online in addition to their print editions. In addition to this, some news content on news websites has been put behind pay wall i.e. readers are now expected to pay for content. Some newspapers now have an online edition of all their news which is only available by paid subscription. This development enables readers to read the newspaper using digital devices such as PC"s, IPhones, I pads, Blackberry"s and Windows mobile devices .This is a means by which newspapers are attempting to stay relevant in the digital age. Offering readers news only through subscription can also provide a challenge to newspapers as they have to provide content that is worth paying for.

*As one key informant remarked:*

*"We make people pay for online content so we have to offer them something different that they cannot get elsewhere."* [5]

Launching an online business model which ensures putting news content behind pay wall is a challenge for other less established newspapers. As was gathered from the interviews with key informants, newspapers have to establish their brands prior to being able to provide online news on a subscription basis. The challenge is competing with other more established brands and attaining loyal readership that would still see the need to pay for online news content. One interviewee held that:

*"At the moment we keep all content available on the website because the paper is only a few years old. We are competing against other established brands. It"s more or less in terms of brand visibility and establishing our brand on the market…"* [6]

[3] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.
[4] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.
[5] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.
[6] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.

Thus, while newspapers continue to be faced with financial pressures and competition from other news sources, the challenge becomes maintaining high standards in news reporting. This could work positively in terms of news quality as newspapers make an effort to report news in a more professional manner to keep their relevance and to avoid the collapsing of print media in South Africa.

Some newsrooms do not have separate staff for online and print news. Hence journalists are occasionally required to update news online i.e. on the news website in addition to Facebook and twitter feeds over and above reporting news for the print copy. This could have the effect of increasing the pressure journalists are faced with and may impact on the news output produced. To elaborate on this point, one key informant mentioned the following:

*"When there is a mistake on a story, newspapers also have to correct the information on the website, on their archives; some don"t, even though the story was corrected on print. That is a problem…"*[7]

*d) Pressure in News production*

The process of news production is marked by a lot of pressure as newspapers are faced with deadlines to publish news and they compete among themselves to publish breaking stories first. Pressure in news production combined with newspapers competing to break news first can have an impact on the quality of news produced as the focus may be driven by speed as opposed to maintaining high standards in news reporting. Natalie Fenton (2010) held that commercial pressures in journalism are likely to increase the temptation to rely on cheaper forms of newsgathering and this can be detrimental to original in-depth journalism.

*The following was stated by one interviewee:*

*"There is a lot of pressure in news reporting, to be the first with stories, which can take the focus away from giving in-depth news."*[8]

Pressure to produce news intensifies particularly in newsrooms that are unable to have their journalists specializing in specific news beats. In cases where journalists are able to specialize in specific news beats and are not required to perform additional tasks, there is less pressure given that journalists have more time to focus on their assigned tasks. Journalists have high targets to meet and in some newsrooms they are required to be multiskilled as they have to report on different news beats and perform additional functions in addition to news reporting. These include producing news on multiple platforms such as on news websites and on social media and in some instances mentoring junior journalists. As was gathered from the interviews held and the newsrooms in which observations took place, pressure varies between weekly and daily newspapers, with daily newspapers having more pressure to produce news as they are required to meet publishing deadline on a daily basis.

Newspapers face pressure to meet print deadline while also ensuring that all the breaking stories of the day or week are complete and ready for publishing. Missing a deadline especially on breaking news means that other newspapers could get to the news story first, newspapers thus strive to get the breaking news stories out there as quickly as possible. Daily newspapers face more pressure in this regard given the limited time. By the time news stories are sent to print, stories should have been checked for accuracy with all the requirements set by the Press Code having been adhered to. John Pavlik (2001) sees deadline pressures as having serious negative consequences for the accuracy of news. This is because journalists under intense deadline pressure can make errors, have little time for fact checking and can get a story fundamentally wrong (Pavlik, 2001).

Newspapers undergo pressure to produce more news articles for different news platforms in a limited amount of time. This pressure, it is argued could result in fewer journalists gathering information outside the newsroom. There is an increasing reliance on the internet as a source of news and overreliance on the internet could result in a decline in original news reporting. This is further discussed in the section below on "Increased use of technology in the production of news."

Pressure also arises in instances where a newsroom has few reporters having to report on all news stories for the newspapers. This shall be explored further below under the section focusing on "Less Staff". Additionally, multitasking becomes the case in some newsrooms with journalists having to take up more than one job specification as a means of cutting costs (making use of skills that are already available within the newsroom). One senior reporter interviewed stated that she had the task of conducting news desk duties (news editor) in addition to her role of reporting news stories. This is a demanding form of multitasking given that being a senior editor requires high set targets for contributing news stories to the newspaper. Targets set for senior reporters according to one newspaper studied include:

*"…writing three splashes every week, four page leads, contributing towards investigation and mentoring juniors."*[9]

[7] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

[8] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[9] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

On the other hand, news editors are responsible for the overall content of the newspaper. They are required to assign stories to reporters, listen to story ideas, and give direction on how to work on news stories. Thus having to perform multiple tasks as this case in point demonstrates may result in pressure that could have an impact on the quality of output.

As was gathered from the interviews conducted, the difference between weekly and daily newspapers is becoming more blurred. This is because weekly newspapers are also under pressure to report on breaking stories on online platforms as they unfold. A key informant from a weekly newspaper held that:

*"We don"t think of ourselves in the way that weekly newspapers were. They were slow, had luxury of time. We produce daily and are constantly breaking stories online. So I think differences between daily, weekly and online have fallen away."* [10]

Thus, both weekly and daily newspapers are faced with pressure in news reporting although it could be argued that daily newspapers face more pressure to meet publishing deadlines on a daily basis.

Other forms of pressure that newspaper corporations face include the requirements of meeting deadlines for the printing and distribution of newspapers. Most newspapers do not own their own printing press; these are shared among different newspaper publishers. Printing times are set by the printing presses thus newspapers have to meet the set deadlines for printing. Failure to do so could result in their time slots being taken by other newspapers. Additionally, the service of distributing newspapers for sale after they have been printed is outsourced which requires that newspapers submit their print copies to the organization(s) in charge of distribution within the set deadline. Outsourcing the service of distribution of newspaper is cheaper for print media corporations than if they had to employ full time staff and obtain additional resources for the distribution of newspapers. An additional advantage is that of making use of labour from organizations that have specialized skills and resources for the effective distribution of newspapers.

Labour process theory looks at how technology is used to increase productivity in the workplace. Technological advancements such as the internet, instant messaging and mobile phones aid journalists to deal with the pressure faced in news production thereby enhancing quicker production. For instance journalists can receive documents from their sources via email or fax and can download some information such as court cases from the web which makes the process of news gathering less demanding.

As I have mentioned above, in some newsrooms journalists are required to multitask for instance by reporting for different news platforms including online. This results in journalists having to learn additional skills to enable the performance of other tasks required in the newsroom such as producing social media feeds, uploading videos for news stories online and producing news for different news beats. In this process of journalists learning additional skills and having to perform more tasks, it could be argued that they are up skilling. This is as opposed to Braverman"s (1976) deskilling thesis which entails workers losing skills upon performing repetitive tasks with the introduction of technology to the workplace.

*e) Less staff*

In the labour process, capital has a primary motive to produce surplus, thus management seeks to cut production costs by all means while attempting to keep productivity high. This explains the cutting of staff in the newsroom as a means to cut news production costs. However, the challenge that arises may be dealing with the consequences of having few staff in the newsroom who will effectively cover all news stories. Contradictions thus exist in the labour process theory as is shown by this factor of reducing staff. Having less staff could lead to more pressure in news production and it is arguable in some instances whether this does not result in failure to adequately verify the accuracy of news stories and failure to provide in-depth cover of a broad range of news stories as required.

As gathered from the newsroom observations which took place during the data collection phase as well as the interviews held, various newsrooms have few reporters to cover news stories. This has come about in an effort to cut costs in the production of news given the financial constraints that Print media has had to undergo with the decline of revenue from circulation. One key informant held that:

*"We do not have enough staff to cover all stories, often we don"t cover stories that we are supposed to because we do not have the manpower."* [11]

It is important to note that some newsrooms still have enough journalists to be able to permit specialization in news production. Newsrooms with less journalists experience more pressure with reporting news as they have less time to adequately focus on news stories as opposed to those that focus on specific news beats would. One key informant from a newsroom with few reporters stated that:

*"I think understaffing is a problem, journalists are expected to produce so much and quality disappears*

[10] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

[11] Interview, journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

*along the line. You do not have enough time to read things because you are under pressure to produce."[12]*

*One further remarked:*

*"Where there are few people, your quality goes down, your checks and balances go out of the window. You are chasing profits and you become less careful."[13]*

*f) Juniorisation and Inadequate training in journalism*

Juniorisation of newsrooms is part of the strategy to lower production costs as the cutting of staff discussed above. As economic constraints weigh on news production and as newspapers" profit models are threatened by competition from new media sources of news as has been discussed, there is need for newspapers to cut costs where possible.

Newsrooms have become more juniorised as more senior experienced staff are more expensive to hire. Due to financial pressures that Print media has been undergoing, more senior journalists have been replaced with juniors. Some newsrooms are more juniorised than others. Juniors often have less skills thus they may require additional training and mentorship to enable them to work independently and maintain the high standards required with news reporting. Increased Juniorisation in newsrooms may impact on the quality of news produced in instances where juniors are not offered adequate training prior to being allowed to produce news for newspapers.

There are also reduced numbers of skilled people in newsrooms as a number of senior reporters leave the journalism profession to become part of other fields, most prominently Public Relations. One key informant remarked:

*"It"s a very young newsroom…I wish we had a couple of older people for experience."[14]*

Juniorisation can turn out to be a challenge in the production of news. This is because there are demands and tight deadlines to be met and there may not always be time to guide the juniors to sufficiently verify their news stories and/or subbing tasks prior to publishing of the newspaper. One problem which exists in some newsrooms is that of promoting junior reporters to higher positions too early in their careers. In this instance, juniors are given a lot of responsibilities in the newsroom without the necessary skills or experience to cope with the demands and pressures required in the newsroom (Steyn and De Beer, 2004).

*One interviewee held that:*

*"Lots of staff is junior to midlevel and there are a lot of demands. This puts pressure on you as a news editor because often you find yourself writing stories for the juniors although they are the ones who would have gone out and brought the stories into the newsroom."[15]*

Thus, juniors may at times be less capable in producing news stories but as a result of shortage of staff and pressure in the newsroom, they are required to also produce news stories for the newspapers. The challenge then becomes one of maintaining good standards in news reporting and ensuring that there is checking and rechecking of stories so that news stories adhere to the Press Code, while on the other hand attempting to keep costs low by hiring less skilled people.

To support the argument that replacing senior reporters with more juniors could have an impact on the quality of news produced, one key informant stated that:

*"The institutional memory of news reporting is gone. The juniors take up 80% of the newsroom; they do not know what happened five years ago. Some of the junior subs edit and they chop and change and they don"t necessarily know the important issues"[16]*

Newsroom juniorisation provides further illustration of contradictions in the labour process as juniors are cheaper to employ but they may have less experience and thus produce less. As has been argued, the quality of news can be affected in instances where juniors are relied on to carry out more demanding tasks like the subbing process in news production.

The production process of news has generally entailed lack of autonomy for junior journalists. Juniors are often assigned to stories to work on by the news editor. News editors then guide the juniors and advise them on the direction the stories should take. This lack of autonomy among junior journalists is now shifting as was revealed from the interviews conducted. Some junior journalists do have autonomy as they are able to come up with their own story ideas which get approved by the news editor. One junior reporter interviewed emerged as an independent journalist who has been able to come up with breaking news stories and front page leads. This was confirmed by viewing copies of the news stories that this junior had written in the past. This reporter stated that:

"*As a junior, the contract says the editor chooses news stories for you, but it depends on one"s capabilities…I come up with my own stories, I always get my stuff together…" [17]*

*"As a junior, you still have to learn everything. But, with me, everything worked differently. I wrote my first front*

[12] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[13] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

[14] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

[15] Interview, Journalist from a Daily newspaper, Johannesburg, 2012-11-27.

[16] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

[17] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

*page story in three weeks! I have been told that journalism needs me."*[18]

This shows that even juniors can be capable of reporting news effectively and maintaining the standards of news reporting. Thus, one cannot argue that juniors will always produce news that does not adhere to standards of quality news reporting as exceptional cases do exist. Burawoy‟s theory of the labour process demonstrates how workers have some autonomy in production relations. Applying this theory to the newsroom, as has been shown some journalists, even juniors are able to independently produce news stories without editors directing to them which stories to cover and how to go about covering them. As Bourdieu argues, autonomy is valued in a field, thus junior journalists that are able to go against the set structure and effectively produce news stories will be of value in newsrooms.

One major point gathered from the interviews held with key informants from different newspapers is that; the inadequate training offered to journalists as they enter the profession is a key reason for the decline in news quality in South African Print media. Most participants interviewed established that inadequate training for journalists entering the profession impacts on accurate news reporting. One key informant stated that:

*"The calibre of journalists coming through the training programme is shocking. And these people have completed their degrees or diplomas! I‟m shocked at the quality of the people; we need to up the game in journalism training at the Universities, Technicons and colleges. The standard of journalism training needs to improve."*[19]

An additional problem with journalism training is that mentioned above, namely that of lack of training with regards to the application of media ethics. Journalism students are taught more theory in media institutions, thus when they begin working in the newsroom they face difficulty in applying the theory they have learnt such as making good ethical decisions and adherence to the Press Code in news reporting. One key informant stated that:

*"The theory should be scaled down not overemphasized, students should be taught to apply. That is part of the problem, because journalists are not ready to apply what they have learnt. There are exceptions of course, but this applies to most institutions."*[20]

A key informant from another newspaper talking about the problem with news quality in South Africa held that:

*"There is a lack of investment in people, in training. We should be concerned about this and look at rectifying it."*[21]

However, despite the challenge of lack of training as mentioned, several media houses offer internships to juniors that are entering the journalism profession. These help to practically train and prepare journalists for the news reporting process. Journalism ethics is part of the curriculum in the media internship of one media group studied. As one former intern from the Group interviewed held:

*"During the internship, we got visited by the Ombudsman to talk about ethics in journalism, case studies of bad reporting and how to avoid errors. It was rewarding…"*[22]

There is thus need to invest in the right quality of journalists for better news quality.

g) *Increased use of technology in the production of news*

Technological developments, particularly the internet have brought about fundamental changes to the production of news. News readers are now exposed to other sources of news; online, radio, and television which has brought about a decline of Print media as the main source of news as has been discussed above. Technology such as cell phones, computers/laptops and video cameras are beneficial to the work of journalists. Journalists are now able to report on news from wherever they are as they can record news events with their mobile devices and speak to sources more easily. News can now be uploaded instantly onto news sites as well as social media. Journalists also find the internet as advantageous as they are able to find documents such as court cases online which saves time. The speed of the internet enables journalists to get data without having to leave the newsroom.

Rupert Murdoch (2005) sees the internet as a useful tool that newspapers can use to their advantage in order to remain competitive. One way of doing this which he mentions is that of encouraging readers to think of the web as a place to engage reporters and editors in extended discussions about particular news stories. Thus, the internet provides an advantage of allowing interaction between journalists and readers on issues that would have been reported on.

It is worth noting that, the production process of news is not entirely driven by technology. There is still a crucial need for journalists to go out where events are

[18] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[19] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

[20] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

[21] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.

[22] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-12.

taking place and speak to people. One key informant stated that:

*"In journalism the story is not told by sitting in your office and speaking to the people on your telephone. Journalists need to speak to people face to face regularly for the best stories."*[23]

The internet is a useful tool in news reporting if used appropriately and if all information obtained from it is verified to ensure accuracy. Angela Philips et al (2010) state that for journalists trained to use web searching tools intelligently, the speed and scope of the internet and the ability to make connections between different pieces of information makes it a powerful tool. On the other hand, the internet can be problematic if used as a primary source and if journalists do not verify the information they find online. Thus, talking to sources and going out to obtain more information be it in the form of pictures, videos or speaking to those affected by the incident or those who witnessed an event provides more in-depth news. The internet also becomes problematic when journalists plagiarise information from the web to write news stories which results in a greater homogenization of news content. One key informant stated that:

*"I hate it when journalists use the internet and construct their stories by not going to meet people. I don"t allow that as far as I can, you need to go out and talk to people…"*[24]

Another key informant reported the concern of a decline in the practice of journalists going out to speak to sources and obtain in-depth information for news stories. As was held:

*"There is a practice of telephone journalism; journalists do not go out there anymore. Journalists are lazy! They are waiting for reports and documents to land on their lap; they don"t go out and do old school journalism anymore."*[25]

This section thus shows how, as labour process theory articulates, technological developments are essential in a workplace to increase productivity. In the newsroom, technological advancements make it possible to produce news quicker for instance contacting sources has become easier with emails, mobile devices and instant messaging. Journalists are also able to communicate with their news editors while on their laptops, ipads or other mobile devices. This means that journalists are now able to write stories from whichever location and still receive feedback as required. As one key informant held:

*"We have purchased equipment for our reporters. They get laptops, electronic readers, data cards and they can do the job wherever they are."*[26]

Technology in the newsroom has thus helped to enhance "speed up" news production and also to try and manage the pressure in news production. It has been further argued that the introduction of technology in the workplace has resulted in more subtle forms of control. For instance in the newsroom, journalists are not necessarily physically supervised, editors are able to monitor journalists news stories via an online database by which they submit their stories.

A challenge arises with use of technology if journalists over rely on it specifically, the internet. Should journalists rely on the internet as a source of obtaining information for news stories, this could result in a loss of the traditional high end journalism skills where by journalists obtain in-depth information for new stories by speaking to people and exploring the broader picture of news stories. The result of this could possibly be what Braverman speaks of as deskilling whereby workers lose their skills as they perform repetitive less challenging tasks. In this case, journalists may become deskilled with over-reliance on the internet for news stories and not seeking to verify information by speaking to independent sources.

*h) News Agencies and Use of freelancers*

Use of news agencies and freelancers are a means by which newspapers are able to obtain news stories on a need basis i.e. when the journalists in the newsroom are unable to cover news stories in other regions. This is thus a means by newspapers to increase productivity in the production of news. When there is a breaking story, newspapers ensure that they are able to cover it as they could lose readers and possibly their credibility should they be unable to cover news stories that the public needs to hear/ read about. Using freelancers is a cost cutting means given that these are only used and paid on a need basis. News agencies could also be a cost cutting means as newspapers do not have to pay travel and accommodation costs to send reporters to cover stories in all regions, instead they subscribe to news agencies.

Newspapers subscribe to News Agencies to cover other news stories. News agencies supply newspapers with news that is beyond their reporting reach. Newspapers may not always have enough journalists to adequately cover stories in certain regions. A key informant stated that:

*"We have access to wire copy like Reuters and SAPA, so we have different ways of getting stories for the*

[23] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.

[24] Interview, Editor from a Weekly newspaper, Johannesburg, 2012-11-28.

[25] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

[26] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.

*newspaper. In terms of reporting, we concentrate on the story that we are not going to find elsewhere…"* [27]

In addition to News Agencies, freelancers are used to cover other news stories where need be and are paid according to what they produce. Freelancers can offer newspapers stories, otherwise they can be contracted should there be need for them to report on specific stories.

i) *Managerial Control vs. autonomy in the production of news*

Managerial control is an essential aspect in the process of news production to ensure that productivity is kept high and newspapers standards of news reporting are maintained. News editors are generally the directors of the newspaper as they come up with the story diary of the newspaper, assign stories to journalists and monitor news stories that journalists are working on. The editor on the other hand makes the final decision about what is included in the newspaper and is responsible for all the content in the newspaper. Describing a typical day in news production in a daily newspaper, one key informant held that:

"*In the morning, reporters sit with the news editors; they tell them what they are going to be doing. Story ideas can be agreed to, interrogated or dismissed."*[28]

This shows that journalists can come up with story ideas that they would like to work on thus they may have some autonomy in news reporting. This is on condition that the news editors agree to the story ideas. News editors still remain in control of the stories in the newspaper as they can dismiss story ideas and suggest others in addition to giving direction to the story ideas agreed on.

As labour process theory shows, workers can be separated from the planning aspect of work, Braverman refers to this as the separation of conception and execution of labour. In news production, journalists" stories can get changed by editors without them even being consulted. This shows how journalists are not part of the whole production process as they are not involved in the finalization of news stories.

Control in the production process of news has shifted to more subtle forms over time. One way this is shown is by the sitting structure in most newsrooms. (As observed during the data collection phase) Section editors, editors and journalists work on the same floor. The set-up is in such a way that journalists are able to interact well directly with the editors and vice versa. Journalists can also access the editor"s office which is also situated close to their workstations thus the hierarchy is not visible. As one editor stated:

*"Restructuring has brought an invasion of the power principle, I no longer hold power in the way that editors used to, and people demand answers. In the past, the editor was the oracle. Now you get challenges, some people actually help me edit the paper. Now we have less hierarchy, we sit on the same floor."*[29]

Managerial control is further visible in the targets that management sets for journalists to meet in production. Journalists are expected to adhere to certain targets in the production of news in order to keep productivity high. Management ensures that these targets are adhered to, in this way ensuring that the standards of news reporting set by the newspaper are maintained. As one key informant stated:

*"The market also sets the standards-if you are not good you won"t sell. We can move people along if they don"t deliver. "*[30]

From the interviews conducted, it was found that autonomy in news production is generally less among juniors. It should however be noted that this is shifting (as was discussed above) given that some junior journalists can have autonomy as was shown by one junior journalist interviewed. Junior journalists are less skilled in news reporting and are thus more often than not less capable. As a result of this, there is constant need to mentor them and guide them through the stories they are working on to ensure that it is done according to the newspapers standards. They work according to what they are told to do; in this case control becomes essential to making sure that they perform as required. One key informant illustrated the difficulty of working with juniors by stating the following:

*"We spend more time trying to re-write the stories juniors write."*[31]

However, this lack of autonomy among juniors is shifting as there are juniors who are able to come up with story ideas and also write well researched stories on their own without the need for constant guidance. Thus juniors can still go against the set structure which expects news editors to detect stories and how they work on them. This shows journalists can have agency and change the set structure to how they see best while still maintaining the newspapers standards of reporting. The same can be said about senior journalists who can challenge news editors and make contributions to the story diaries which may have already been set. Autonomy thus exists among journalists with capabilities of reporting news that maintains the standards set by the newspaper itself and the Press Code.

[27] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.

[28] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.

[29] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

[30] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

[31] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

This factor is demonstrated but one key informant‟s statement:

*"As a junior, the contract says the editor chooses the story, but it depends on one‟s capabilities-I come up with my own stories, I always get my stuff together."*[32]

Thus, to conclude, the restructuring taking place within newsrooms can be explained by the labour process theory which shows how news is a commodity and is produced in order to make profits. Hence, the newsroom structure has to be adapted to changing information technology to ensure that newspapers remain relevant, are able to cut costs where possible and continue to maintain profitability. Although labour process theory shows that there is a constant tension between production and profitability, it is important to note that labour process by itself cannot adequately explain the process of news production. Labour process theory does not show that journalists have agency and are also self-motivated and may not feel exploited, journalists may feel satisfied in them performing a public service. There is thus a need to turn to Bourdieu‟s field theory to explain journalists‟ agency and the production of news as a public good as news is not just produced in order to make money; media is an essential pillar of democracy as has been pointed out. The following section is grounded on Bourdieu‟s field theory to illustrate the agency newspapers and journalists have in the production of news.

## Chapter Five

## V. The Production of News as a Public Good

This chapter adds to the discussions made in the previous chapter by showing how news is also produced as a public good. As pointed out earlier, labour process theory runs the risk of being structuralist and not viewing journalists as capable agents who can make independent choices in the production of news. I turn to Bourdieu‟s field theory in this chapter to explain agency existent in the process of news production. I will draw on the following concepts from the theory to explain the production of news as a public good; Agency, autonomy, economic and cultural capital, and the rules of the field. It should be noted that although news is also a public good, there still remains a constant tension between producing news professionally for public interest and producing news that sells to meet the profit motive. Thus, when the profit motive supersedes that of ensuring that news as a public good is produced professionally to serve society, the quality of news is affected as the case studies in chapter six allude to.

In this section, I discuss other factors that impact on the quality of news in South African print media that are not directly related to the issue of restructuring. These factors illustrate how newsroom staff and newspapers broadly have agency to manoeuvre through the strategies or means of restructuring taking place within newsrooms and strive to continue to produce news while attaining profits. Through the formal rules of ethical reporting that are set by the Press Code, newspapers are able to attempt to remain relevant and also to ensure that they still make profits. Although in some instances, quality may be lost along the way as newspapers attempt to keep a balance between professionalism in news reporting and keeping profits, there are still means and structures by which newspapers check or verify accuracy in news reporting. The factors to be explored that demonstrate the room for agency within newspapers are as follows: skilled people leaving the journalism profession, Non adherence to the Press Code, news sources, competition to produce breaking news stories, means to verify accuracy, preoccupation with politics and sensationalism of news.

### *a) Loss of more skilled/experienced people as they leave the Journalism profession*

As has been highlighted in this paper, technological developments in the newsroom have brought about significant changes in news production. One of the impacts of these changes has been that of newsroom operations being under financial strain due to threats caused by the availability of news freely online and having to compete and adapt to these changes. One negative result of this has been the departure of some experienced journalists from newsrooms as they are dissatisfied with the financial incentive which does not seem to go with the demands and pressures involved in the work of news production. The journalism profession faces a major challenge of losing some skilled journalists as they leave for other fields, most prominently being public relations officers. As gathered from the interviews held, part of the reason for this is for financial gain as some journalists feel the journalism profession does not offer reasonable salaries for the amount of pressure and hard work involved. This loss of skilled people impacts on the level of expertise that newsrooms have as well as their ability to maintain high standards in news reporting. One interviewee held that:

*"We have seen smaller newsrooms, smaller numbers of editors, and editors are a really important quality control layer. The expertise of these people has been yoked and they have gone into public relations etc."*[33]

One key informant interviewed who showed high levels of expertise in reporting for the newspaper

[32] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[33] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

she worked for held that she was leaving journalism for good. The newspaper‟s editors had tried to overturn her decision but she was still leaving the profession. She remarked at the level of pressure that came with being a journalist which produced strain to one‟s personal life. As was held:

*"My sources are hurt that I am leaving journalism. They say I‟m young, I have guts and I‟m very convincing…Journalism does need me, but I also have a life…"*[34]

This aspect of more skilled people leaving journalism further demonstrates contradictions existent in the labour process. Technology is beneficial to the workplace in order to enhance productivity and simplify tasks. On the other hand, technological advancements can result in other challenges in a workplace. In this case, because of technological advancements leading to the availability of immediate and readily available news sources, newspapers have been faced with financial pressures as they strive to compete with online news sources and attempt to remain relevant. As a result of these financial pressures, newspapers end up losing skilled staff that they may have invested training on thereby further causing a shortage of skills in newsrooms. This becomes a serious concern for newspapers which sometimes end up digging deep into their budgets to pay journalists more money to prevent them from leaving their newsrooms.

This aspect of journalists leaving the profession also shows that despite the internal labour market which Burawoy spoke about which promotes mobility within firms and encourages workers to stay longer in firms, journalists have agency and can still make personal choices and decide to leave when they see fit.

*b) Disregard for the Press Code*

Disregard for the Press Code is a key reason for the decline in news quality in the South African Print media. The Press Code guides journalists on news gathering and reporting to ensure that standards of media ethics and responsible journalism are maintained. Journalists have the role of accurately informing and educating the public of what is taking place in society, thus it is crucial to adhere to the standards of accurate reporting set by the Press Code. If the Press Code is properly enforced, it aids in maintaining standards in accurate news reporting. If the public is not well informed, unnecessary harm can be caused to people, society would become misinformed and as a result the public could lose confidence in media reporting.

One key informant from the office of the Press Ombudsman reported the disregard of the Press Code as being one of the major challenges to the decline in the level of South African journalism. Upon visiting media houses around the country, members of the office of the Ombudsman established that a large number of journalists had not read the Press Code in addition to not being able to apply it. It was held that:

*"We found that some have not even heard of a Press Code, it was shocking for us. This accounts for unethical reporting because the Press Code is the ethical guideline. So they use their common sense as a guideline"* [35]

Key informants interviewed saw the importance of abiding by the Press Code in news reporting as it sets the standards of accuracy in news reporting. There was general consensus among the interviewees as to the fact that reporters are expected to familiarise themselves with the Press Code. One informant held that:

*"The Press Code should be like our bible in reporting. The Code protects newspapers, if you adhere to it there is no way you can be taken to an Ombudsman or challenged for something you have written."*[36]

*Another informant held that:*

*"The Press Code helps to keep the standards and remind you of the rules you have to follow. It becomes part of you as a journalist, that I can‟t do this and I can‟t do that, and as a newspaper as well."*

The Press Ombudsman is the watchdog of the Press and ensures that newspaper practice proper application of the Press Code and report news accurately. All participants interviewed, except one, saw the role of the Ombudsman as being effective in instilling accurate news reporting within print media. One interviewee held that:

*"The Ombudsman has become more active to say newspapers‟ apologies should be on the front page or have as much prominence as the story did. This affects the newspaper‟s reputation and the more times you have this you can lose trust with your readers."* [37]

The Ombudsman thus has a crucial active role to play in ensuring that the Press Code is properly practiced and applied among newspapers. Newspapers face penalties if found to have been in breach of the Press Code, these involve newspapers being asked to retract stories to the most serious penalty being that of a front page apology. Having to do a front page apology is damaging to a newspaper‟s reputation and could result in more accurate reporting going forward as the newspaper strives to maintain its readership. As an interviewee described:

[34] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[35] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

[36] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

[37] Interview, Journalist from a Weekly Newspaper, 2012-11-26.

*"A front page apology hurts the newspaper; it takes away their credibility and valuable space."*[38]

One key informant who did not see the role of the Ombudsman as being useful in instilling accurate news reporting among newspapers stated that:

*"In my opinion, I don"t know what the Ombudsman is there for. They have been coming down hard (unnecessarily) on newspapers because of the information Bill; they want to show government or whoever it is that they want to show that they are hard on newspapers…"*[39]

A further challenge noted in newspapers reporting news inaccurately is that of failure to apply the Press Code to news production. After the office of the Press Ombudsman began a countrywide campaign to make sure that media houses had a copy of the Press Code, there was found to still be problems with newspapers adequately applying the Code. The following was mentioned, to further emphasize the point:

*"Most of the curriculum in media institutions is on theory, the last part is practical. Journalists are supposed to be trained to make good ethical decisions…* [40]

Non adherence to the Press Code by newspapers illustrates the challenges faced by newspapers in maintaining the rules or standards to be maintained in the process of news production. Newspapers have agency and decide what they see as news that will sell and may risk going against the requirements of reporting set by the Press Code. Bourdieu"s field theory shows how agents in a field can attempt to change the rules of the game to their own benefits. A conflict exists between the formal rules of the field as set by the Press Code and the informal rules (e.g. the need to come up with breaking news first) which enable newspapers to maintain high profitability and continue to produce effectively while undergoing financial pressures and competing with other news sources. Even after newspapers have been sent to the Press Ombudsman for inaccurate reporting, they still go back to the same news production process and battle with the same pressures and challenges and the need to keep making profits. It thus becomes a challenge for newspapers to produce professionally and maintain profitability at the same time.

*c) News sources*

News sources are an important aspect of news reporting thus maintaining a good relationship with sources is important, while at the same time ensuring that newspapers still write balanced stories and avoid being biased in news reporting. Talking about the importance of maintaining a good relationship with sources, one key informant held that:

*"Contact building is important; sometimes you take them for lunch. You need to take care of sources e.g. being polite and showing courtesy. Some sources are scared; we have to protect them because without them we would not have had some of the stories that we do…"*[41]

Journalists may face challenges in obtaining information from news sources and contacts. Some sources can be difficult to reach or unavailable thus making it difficult for newspapers to write fair and balanced news stories in time for print deadlines and this can be a challenge in news production. In addition to this, some sources may not be honest in what they report to newspapers which may have an impact of news quality if newspapers do not check and verify information effectively. News sources may want to drive their own personal interests in order to gain public favour. One key informant stated that:

*"Sources are a greatest asset and liability, cultivating and getting trust is important to having a source of news all the time. On the other hand, sources have their own motivations; they can get you into big trouble if their motives are not pure and they want to serve their own personal interests."* [42]

*One other interviewee held that:*

*"Businesses or organizations can be slow to produce or formulate responses to a crisis and we have deadlines, then sometimes you end up not being able to run with the story. Sometimes, sources can lie, if you cannot see them it"s worse…"*[43]

It is thus important to verify all information received from sources, regardless of the kind of relationship that has been built with them to ensure fair and unbiased news reporting. One interviewee said the following:

*"I always ask my sources for proof in the form of documents and not just accept the story."*[44]

With technological developments in the newsroom such as online and social media news reporting, use of emails and instant messaging to communicate and the web to access information, there has been less face to face contact with sources. This has posed as a challenge to the quality of news produced. This is because more reliance on the web for

[38] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

[39] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

[40] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

[41] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

[42] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

[43] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[44] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

news stories results in the loss of traditionalistic journalism standards in which news gathering involved speaking to more people and obtaining more in- depth accounts of stories. One key informant stated that:

*"Journalists want to read up stuff on the internet, there are less face to face meetings with sources. They expect sources to come to us instead of going to them and saying –what do you have for me…"*[45]

Using other newspapers as sources of information was noted as being an additional problem in the decline in the quality of news produced by newspapers. As was stated:

*"Using other newspapers as a source is a problem, assuming something is true because it was published. Newspapers should still verify information. They simply Google and those are not primary sources, you cannot verify with a secondary source."*[46]

Reliance on the internet as a source of news instead of journalists going out to gather information by speaking to people could result in what Braverman termed deskilling. Over time, journalists could lose their skills of taking part in in-depth news reporting which involves meeting people and investigating issues outside of the newsroom and not relying on the information on the internet.

To deal with the challenges that may arise with dealing with news sources, newspapers may rely on sources that they already know to obtain information for news stories. Additionally, the choice to rely on the web as a source of information for some news stories so as to produce news quicker may be made by journalists. It is important to know that choices that newspapers make have consequences and can in some instances work against the quality of news. For instance as Case study one in chapter six shows, reliance on sources already known from the past and not verifying information with other sources may result in inaccurate reporting.

*d) Competition*

As Bourdieu‟s field theory stipulates, within a field, there is competition for legitimate appropriation of what is at stake in the struggle within the field (Bourdieu, 2005). Within the field of journalism, there is competition to appropriate the readership, to come up with breaking news first and to publish exclusive information.

Prior to the internet becoming a major source for news for many readers, in daily print journalism, reporters would not know if they had been „scooped‟ by rival newspapers until the next day‟s newspapers were out. By then it would have been too late to do anything about it. Now, as news has become more digitalized, every story goes online instantly and journalists are now under intense pressure not to miss anything appearing on their rival‟s websites (Philips, 2010).

*One key informant described print media as very competitive and held that:*

*"The market is very competitive, we have to stay relevant. You have to get very good people, you have to keep watching what the big papers are doing. You have to see yourself as global, you have to be interesting don‟t just be concerned with your own country."*[47]

*To show the competition that exists to produce breaking news, one participant further held:*

*"As a weekly, if you miss it, somebody else will cover it."*[48]

It was further remarked by another interviewee:

*"You have to run like a headless chicken, make sure you get things that no one is going to get. We must make sure we have something different because we have the same readers, otherwise our sales will go down."*[49]

Competition between newspapers also involves other newspapers wanting to „poach‟ more skilled journalists from other newspapers. This seemed to be a common concern amongst most participants interviewed. One key informant held that:

*"The things that these young people can do with technology are unbelievable, so they get poached all the time. You have this contradiction between the size of the newsroom and the emerging hunger for talent."*[50]

*Another key informant stated that:*

*"Junior people get trained and then the person is pouched by other newspapers when they become developed."*[51]

Two participants interviewed held that they had been offered positions in other newspapers one of whom stayed after being offered a salary rise by their current newspaper. The other participant stated the following reason for not leaving for another newspaper:

*"I have been offered two jobs since I have been here. The reason why I stay is because I love the product and I can also see myself develop and I can see the contribution I‟m making towards the paper and also to staff members growing."*

Noteworthy is the fact that news sources are also involved in the competition between newspapers

[45] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

[46] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

[47] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

[48] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[49] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[50] Interview, Editor from a Weekly Newspaper, Johannesburg, 2012-11-28.

[51] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

and between journalists within the same newsroom. As one key informant held:

*"We compete for the same sources even within the newspaper. Often, sources also decide on which newspaper they want their story. They know the intensity of the story and which paper would suit it."*

Burawoy‟s analysis of workers constituting work as a game which made work feel more rewarding and offer emotional satisfaction and extrinsic rewards to workers could be applied to this notion of competition to understand it better. Constituting work as a game involves consenting to production relations while enhancing productivity. It could be argued that by journalists competing among themselves in the newsroom and also by different newspapers competing in breaking news they are participating in playing a game which ultimately increases productivity in the production of news. Journalists have a sense of agency in news production given that with the desire to succeed in their work they choose to perform at their best within the competitive media environment and come up with good news stories that could improve their individual reputations.

The competition to have a front page story for instance could enhance journalists to work hard to try to produce better than other fellow journalists. In the process of doing this, the goal of keeping productivity high in the newsroom is achieved. Additionally, journalists may feel a sense of satisfaction every time that they meet their set targets or produce good news stories that serve a public good and readers acknowledge .Journalists could also try by all means to avoid inaccurate news reporting which could end up in disciplinary action. In this way, journalists constantly strive to stay at the top in producing news efficiently which is beneficial to management as productivity is kept high thereby aiding profit making.

e) *Means of checking accuracy prior to publishing of news stories*

Despite the pressure that newspapers may be faced with, there are still means that they use to check and ensure accuracy of news stories prior to publishing of stories as was gathered from the interviews conducted. In the application of Bourdieu‟s field theory, these means of verifying and ensuring accuracy are an effort by newspapers to adhere to the rules of the field. The rules of the journalism field stipulate that news be produced in a manner that adheres to the South African Press Code.

Newspapers thus have structures in place in the news production process to ensure that these rules are adhered to as failure to do so has ethical implications and could result in the newspaper losing its credibility.

One newspaper group has an accuracy form which is adapted from the Press Code. This form is completed by journalists to show that they have written news accurately. The following is confirmed in the form: if names have been used correctly, if dates, figures, quotations and facts are correct. Additionally the form also checks that the journalists are satisfied with the accuracy and fairness of the story(s) and whether all parties involved where contacted. Finally, a check is done to ensure that all necessary documents were obtained to substantiate the report. One key informant held that:

*"Every single reporter has to sit with another reporter and go through the form. The reporter will then sign the form. This is done every time; if they pick up anything they will go and change it. The form is then filed."*[52]

Newspapers may be faced with high pressure, demands and competition in the process of news production, it is however still crucial to ensure that all news is produced accurately and adheres to the South African Press Code. One key informant further stated that:

*"Accuracy is very important, especially in this day and age with the Protection of Information Bill. We have measures in place to protect ourselves and our reporter. On our accuracy form we ask; „have you spoken to independent sources‟, in this day and age people are running agendas so you can be fed misinformation…"*[53]

The process of news production is structured in such a way that checking and rechecking is done prior to the newspaper going to print. After journalists report on news stories, their stories are sent to the relevant section editors for instance the political editor, sports editor, business editor who then checks the content of the stories and also checks for accuracy. The journalists‟ stories are then sent to the sub editors who conduct further checks on the stories by way of proof reading, checking the grammar and writing story headlines. The editor then does the final checks on the stories and has the final say on which stories are published and which ones are not. Thus, by the time the newspaper goes to print, news stories ought to have gone past processes of checking and rechecking ensuring that news is produced accurately and fairly as set out by the Press Code.

Asked about how to ensure adherence to the standards of news reporting set by the Press Code, one journalist held that:

*"We are our own gatekeepers; we know what will get us into trouble and what can‟t. You as a journalist have to make sure you check everything before sending it to the news desk. The editor will then check. Every story needs*

[52] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.

[53] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

*to have proof of allegations, you must have documents, don"t write hear-say."*[54]

Thus, journalists and editors have to take responsibility in their production tasks to ensure that maintaining accuracy remains central in all processes of production. Should accuracy checks not be effectively conducted during the news production process, this then has an impact on the quality of news produced. The subbing process, for instance, was found to have a profound influence on the final accuracy of news stories produced. In some instances, as was found in the interviews conducted, subeditors cut out important information from news stories sometimes resulting in inaccurate reports. To illustrate this, one key informant held that:

*"I have recently had a case in one newspaper, a complaint about comment not being included in five stories in a row- and that"s so fundamental in a story. All these times, the sub had taken it out for reasons of space. The sub was junior and did not understand the importance of comment."*

This point would demonstrate a case whereby news stories lack a balanced view as the comments would have been removed. The news stories would then be biased resulting in inaccurate news. It is thus essential to have the right level of professionalism in the checking of news stories as failure to adequately check could result in a decline in the quality of news produced. Unprofessionalism in news production can result in unnecessary harm caused to people thus it is essential to conduct thorough checks. Another key informant stated the following:

*"We"ve had an incident recently where the sub cut out a comment from a story and the spokesperson shouted at the reporter. We had to speak to the spokesperson and say- „look we understand that you are angry but the reporter did put the comment, it was the subs that took it off, we apologise for that"…"*

The question that arises then is whether the checking processes in the production process of news are adequate to ensure quality news that adheres to the Press Code. This is questionable as the examples above show that there are still slip ups which take place that result in inaccurate reporting even if there are structures to check and ensure accurate reporting. It should be noted that even within the set structures, agents in the newsroom still have agency to act for instance the subs can decide to alter information in journalists" news stories or as they decide on headlines as they make the choice to sensationalize the headline in a certain way in order to make the story attractive to readers. Additionally, as editors have the final say in what gets published in the newspaper, they conduct the final checks and can make choices on whether there is need to change any information on news stories.

*f) Preoccupation with politics/lack of diversity in the news that is reported*

There was general consensus among the participants interviewed over the fact that newspapers overemphasize on reporting on politics. It was found that newspapers at times lose sight of other important aspects going on in society that the public needs to be informed about. There is thus lack of diversity in the news stories that are reported there by losing sight of the bigger picture in society. One key informant stated the following:

*"I think journalists have become preoccupied with politics, production and celebrities and forgotten about the ordinary people on the streets. South Africa is not about politicians, it"s not about Mangaung and the ANC. We have a population of 52million who want to know about stuff that affects them e.g. education, crime and health. Our readers are getting fatigued; we are not offering our readers as much as we should."*[55]

*Another key informant stated that:*

*"We get obsessed with the politics of the day, but a country is made up of people not politicians."*[56]

One could argue that the overemphasis on reporting on politics could be because of a need to sell newspapers. Writing news about politics and exposing politicians could arguably be news that is attractive to readers. Thus in the struggle to maintain profits, newspapers may place emphasis on news that is seen as news that sells. Moreover, this illustrates the agency that newspapers have in deciding what best to focus on in reporting to attract readers.

*g) Sensationalism*

News sensationalism is a further illustration of newspapers altering the formal rules of the field of journalism for the benefit of selling news and hence making profits. Newspapers increasingly sensationalize headlines and news stories to make the news sound more interesting and so that it may be more appealing to readers. This may alter the accuracy of news reports thereby going against the formal rules required in the field of journalism, namely to maintain accuracy and fairness in news reporting. Thus sensationalizing news illustrates how newspaper actively make choices on how best to make the news they produce appear marketable as a product.

News has become more and more sensationalized and this was seen by the participants interviewed as one of the factors that impact on news

[54] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[55] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

[56] Interview, Editor from a Daily Newspaper, Johannesburg, 2012-11-12.

quality given that news that is sensationalized occasionally results in inaccurate reporting. For purposes of this project, by Sensationalism, I refer to: the use of exciting or shocking stories or language at the expense of accuracy in order to provoke public interest. Sensationalism can be used in order to entice readers, in order to sell the paper. There was general consensus among the majority of participants interviewed that sensationalism does result in a decline in the quality of news that newspapers produce. One key informant held that:

*"With digital media, people want to bring out the more sensational topics, this has been detrimental to overall news quality; we end up reading the popular stuff instead of the more in-depth stories."*[57]

*Another interviewee held that:*

*"The problem is that journalists rush to sensationalize news, to me that"s the biggest problem in news quality-publishing stories that sound exciting to readers…"*[58]

*h) Effects of newspapers being sent to the Press Ombudsman*

From studying the Press Ombudsman rulings with newspapers over the years, there appears to be a reoccurrence of the same newspapers breaching the Press Code repetitively. A question that then arises is; is the role of the Press Ombudsman in ensuring that newspapers report news accurately and holding them accountable for failure to do so taken seriously or has being taken to the Press Ombudsman for inaccurate news reporting now been normalised by newspapers? From some of the interviews conducted with research participants, it appears there may be to some extent, a normalisation of newspapers being sent to the Press Ombudsman. Asked if the reputation of the newspaper had been changed by the Ombudsman ruling against one particular newspaper after having breached the Press Code in news reporting, one key informant held the following:

*"The reputation of the paper did not change; we know the political environment we are operating in at the moment. „Newspaper A" was also taken to the Ombudsman; Newspaper B" was also taken there by the same complainant. So the credibility of the newspaper is not affected by something like that. And I mean one political party took „Newspaper C" to the Ombudsman who then ruled against the newspaper"s favour…"*[59]

From the above quote, it would seem that just because the majority of newspapers, even those with a lot of credibility from the public get reported to the Press Ombudsman at some point then this does not necessarily do harm to the reputation of newspapers. The factor of concern then becomes that; does the penalty given by the Ombudsman to newspapers found to be in breach of the Press Code actually discipline newspapers. In addition, are the penalties given to newspapers sufficient enough to bring about a decline in inaccurate news reporting? In an interview with a key informant from the office of the Ombudsman, he expressed similar concern with the procedure for sending complaints on newspapers. It was confirmed that, (at the time of conducting the interview in November 2012), the complaints procedure did not effectively address the problem of newspapers being constantly on the wrong. The following was stated:

*"I"m not sure if the current complaints procedure helps because newspapers keep making mistakes. Next year"s system is a huge improvement…"*[60]

*"If a newspaper continues to be on the wrong, at the moment, nothing can happen, but our system will be changing from the first of January 2013 with an amended Press Code and Constitution. Thus, when the new system is in place, if we detect a trend we can summon the newspaper to come to the Ombudsman"s office. We can also ask the editor to appear before the Press council. It"s a huge step forward…"*[61]

Thus, the news complaints procedure which has been in place from the 1st of January 2013 aims to address the challenge of newspapers constantly being found in breach of the Press Code. This is through instilling harsher disciplinary measures on newspapers. I then pose the following question; will this new complaints and disciplinary procedure be effective in bringing about more accurate reporting in the South African Print media? Given that newspapers are still exposed to the same labour process of news production which comprises of pressure, competition deadlines and the pursuit of profits it would be difficult to completely eliminate the errors made in news production. Maintaining professionalism by reporting news accurately and rightfully serving society can be a challenge given that this can clash with the primary need for the newspaper to make profits.

If newspapers are taken to the Press Ombudsman continuously for reporting news accurately, this raises questions on the effectiveness of the rules under which journalists operate. Ultimately, one could argue that if being reported to the Press

[57] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[58] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[59] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

[60] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

[61] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

Ombudsman is normalised by newspapers then a crisis exists in the field of journalism. This is because of agents constantly outdoing with the rules that govern the field i.e. the standards of professional news reporting that are set by the Press Code.

To conclude, in addition to news being a commodity that needs to sell, news is also produced as a public good which has to serve society and be produced within clearly laid out professional and ethical standards. As field theory illustrates, news is not just produced to acquire economic capital but newspapers also strive to obtain cultural capital as they compete in producing breaking news stories and journalists strive to produce original, well researched articles. Newspapers from time to time face challenges in maintaining the professionalism required in news reporting which results in them being taken to the Press Ombudsman as a result of complaints on the accuracy of some of their stories. However, newspapers still take risks to try and ensure that they remain profitable while they continue to carry out their democratic role of informing society and doing so professionally.

In the following chapter, I look at specific case studies which demonstrate inaccurate reporting in the South African print media. These cases illustrate the tension which exists between news as a commodity and news as a public good and demonstrate how the profit motive can occasionally get in the way of quality and professionalism thereby resulting in a decline in news quality.

# Chapter Six

## VI. Commodity vs. Public Good Case Studies

As the previous two chapters have shown, news is a commodity which is produced for sale to the public to make a profit. News is also a public good produced with the need to serve public interest by keeping society well informed of issues that affect them. Given the availability of news from new media sources, newspapers are under pressure to compete with news that is readily available to readers. Technology is increasingly employed in newsrooms to aid journalists to deal with the pressure in news production and to increase productivity. Journalists" work is monitored and checked by editors to ensure that targets are reached, accuracy measures are complied with and that news stories are in accordance to the standards set by publishers. Cost cutting has been employed in newsrooms to ensure that the economic model of news production is adjusted so that profits are maintained. These strategies of cost cutting as discussed above may in some instances be detrimental to the quality of news that newspapers produce. For instance, some newsrooms report of juniors being less skilled and inadequately trained for professional news reporting resulting in them writing news articles that may not have been well researched and therefore inaccurate.

I have also shown that newspapers have room for agency in the production of news as they manoeuvre through restructuring taking place within their newsrooms and as they strive to stay relevant in producing news to the public. Newspapers are faced with challenges as they seek to achieve the profit motive in their operations. These challenges include loss of skilled people from journalism and the difficulty in dealing with some news sources as discussed above. As has been pointed out, newspapers have means and structures in the process of news production to ensure that accuracy is ensured in reporting given that news is a public good. There is an attempt by newspapers to make sure that news, which is a public good, is also marketable to the public for instance by sensationalizing news and focusing on reporting news that sells. Newspapers take risks and sometimes go against the formal rules of the field of journalism set by the Press Code to ensure that the news which they produce is also profitable to them. It is the challenge of achieving both ends of profitability and professionalism that in some instances results in inaccurate reporting as the profit motive may surpass that of maintaining accuracy in reporting.

In this section, I focus on specific case studies that demonstrate inaccurate news reporting by newspapers. I draw from the research findings discussed in the previous two chapters which show the tension between producing news professionally as a public good vs. producing news for commercial purposes with the need to maintain profits. I now focus on actual case studies of inaccurate news reporting to highlight the tension that arises when a newspaper decides to pursue the profit motive by investing less resources in investigative reporting and not following up story leads resulting in inaccuracies in articles that then get published thereby damaging the newspaper"s reputation.

A number of the factors mentioned in the previous two chapters help to explain the errors that were made by these particular newspapers selected. This section thus brings in a more in-depth analysis of the kind of challenges that newspapers are faced with in maintaining standards of news reporting by exploring practical examples. I refer to four recent cases in which different newspapers were taken to the Press Ombudsman for having reported news inaccurately. I then draw on the issues that led to the specific errors some of which are directly related to restructuring and others which involve other factors which illustrate the agency that newspapers have in news production. Each of the errors made by the newspaper shall be looked at in detail in relation to the process of news production and the nature of challenges that arise with regards to

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maintaining high standards in news reporting. It should be noted that most errors that arise in news production can be prevented. Newspapers have agency and they can make decisions to ensure that accuracy checks are conducted effectively in news reporting to avoid mistakes in written articles. Although newspapers have different approaches to news gathering, there are several lessons they can learn from each other in order to maintain high standards in news reporting despite the pressures they may be faced with.

*Case Study One*

*a) Julius Malema Vs. The Times*

i. *Outline of the case*

The Times newspaper reported that there was a joint investigation between SARS and the HAWKS to investigate Julius Malema and that the investigation was almost complete and it was a matter of time before authorities acted. This story which was published on 31 October 2011 was headlined "*Julius Malema on the ropes.*" According to the response from The Times given during the hearing held before the Press Ombudsman following a complaint from Julius Malema, their reporter who had the story had read the story which appeared in The Sunday Independent the previous day, after which she contacted unnamed sources from SARS and the Hawks to follow up on the story.

Soon after the story was published, there was written proof obtained with regards to there being no warrant of arrest by the HAWKS and there being no joint investigation as confirmed by SARS. Thus the Times newspaper had published inaccurate information. The newspaper had additionally failed to provide evidence to support the false statement; unnamed sources from SARS and the Hawks had been used and were not disclosed to the Ombudsman.

The newspaper presented the joint investigation into Malema "as good as complete" and that "it was a matter of time" before authorities acted as a fact yet it was found to be untrue. The newspaper was thus found to be in breach of Article 1.1 of the Press code which requires newspapers to report news accurately, truthfully and fairly. The newspaper corroborated but did not verify its information which is in breach of Article 1.4 of the Press code which states that "where there is a reason to doubt the accuracy of a report and it is practicable to verify the accuracy thereof, it shall be verified. Where it has not been practicable to verify the accuracy of a report, this shall be mentioned in such report." Additionally, the newspaper did not ask Malema or his legal representative for comment which is in breach of Article 1.5 of the Press code –"a publication should seek the views of serious critical reportage in advance of publication."

*b) Analysis of Case Study*

The faults made by the newspaper in this case demonstrate the sort of challenges that newspapers are faced with in the process of news production. Challenges arise in the need to meet deadlines while producing news which adheres to the standards set by the Press Code.

*c) News Sources*

Newspapers are sometimes faced with the challenge of obtaining information from relevant sources for particular news stories. In this case, the journalist who wrote the story failed to adequately contact Julius Malema for comment. According to the findings from the interviews with key informants, attempts made to reach Julius Malema and his spokesperson for comment had been unsuccessful. The newspaper was thus faced with the challenge of attempting to reach the sources for the news story for comment while approaching deadline, thereby in the end running with the story as it was. This further demonstrates the difficulty that arises with newspapers having to meet deadlines, working under pressure and sometimes having to face difficult sources or contacts for information. Sources may not be adequately reached for comment because of the need to meet publishing deadlines and the fear of not running with the story and other rival newspapers getting hold of it first.

As was discussed in the previous chapter, news sources are an important aspect of news reporting thus failure of newspapers to obtain comment may be detrimental to overall news quality. Failure of the newspaper to obtain comment from the key subject of the news story resulted in an unbalanced and inaccurate account. During the hearing, it was held that the newspaper should have contacted Julius Malema"s legal representative after having failed to reach him and his spokesperson. Failure to do so and publishing the story without comment demonstrates lack of professionalism on the part of the newspaper as the Press Code clearly states the need to obtain comment from the subjects of critical reportage. (Article 1.5 of The Press Code).

The newspaper used unnamed sources to obtain information for the story which was found to be based on inaccurate allegations. The newspaper held that these sources had been used in the past and found to be reliable thus the editor and the journalist had no reason to doubt the information. This shows that reliance on sources from the past and not conducting extra checks and verifying the information with other sources results in newspapers reporting biased information. Angela Philips et al (2010) state that with increasing speed and rolling deadlines that newspapers are faced with, the result is that newspapers use the most available sources and these are the sources that they already know. Despite loyalty to sources, it is still crucial to verify information provided prior to publishing news. As one key informant rightfully stated:

*"I have got very good sources that give me the story before other papers, that"s the kind of relationship I have built with my sources…I also ask them for proof in the form of documents and not just accept the story."*[62]

Thus, regardless of how good a relationship a journalist has built with their sources, information still needs to be verified before it can be published. In this way, newspapers are able to avoid unnecessary false reporting.

Thus, as labour process theory illustrates, there is need to maintain high productivity in the production of news and to ensure that profits are generated. As deadlines approach, newspapers are faced with pressure to wrap up news stories and send them to print to ensure that the breaking stories are in the newspaper the following day and the newspaper is able to generate revenue from the sales. In this case, the effort to reach Julius Malema for comment on the news story would have required more time; hence deadline could have been missed. Newspapers fear missing deadlines on a breaking news stories as rival newspapers could publish the story first.

As meeting publishing deadlines becomes a priority in the production of news, this could result in non-conformation to the formal rules of the field of journalism. As the Press Code stipulates, subjects of reportage have to be reached for comment prior to publishing any news story that concerns them. Failing to conform to this expectation set by the Press Code shows what Bourdieu referred to by stating that agents can alter the rules of their field for their own benefit. In this case, the newspaper"s need to publish and sell news led to the failure to adhere to the need to ensure that sources had been adequately contacted prior to going ahead with publishing the news story. This illustrates how the tension between making profits and producing news accurately may play out, in this case with the profit motive prevailing over that of adhering to the rules of the field of journalism.

### *d) Sensationalism*

Sensationalism involves newspapers" use of exciting or shocking stories or language at the expense of accuracy in order to provoke public interest. In this case, The Times newspaper reported that: *the investigation was "as good as complete" and it was "just a matter of time" before authorities acted*. These allegations were found to be untrue. The language used by the newspaper portrayed unverified information as fact and reported it as such. The form of language used sounds exciting to the reader, it is sensationalized yet it is inaccurate. Use of sensationalism in news reporting was found to be a key factor in the decline of news quality in South African Print media as was discussed in the previous chapter. This could be as a result of newspapers" need to sell news and make profit becoming more of a priority that maintaining professionalism in news reporting as was discussed above.

*One key informant held that:*

*"There is the problem of sensationalism, e.g. one newspaper wrongfully calling someone a "war load", that is exaggeration! This is sensationalism, to sell the newspaper. There is complete disregard for that person."*[63]

Sensationalism in news reporting impacts on the standards or quality of news produced as information becomes exaggerated and ceases to be accurate. As economic constraints weigh on production, newspapers must take steps to adapt to the developments brought about by the internet. Consequently, the formal rules set aside for newspapers to stick to in news reporting are altered to ensure that news remains profitable. Sensationalizing news thus becomes a means to maintain the interest of readers to buy and read print copy.

### *e) Inadequate means to verify accuracy*

In the case under discussion, the inadequate verification of information before publishing the news story was a major reason that resulted in the inaccurate reporting by the newspaper. Steps should have been taken by the newspaper to verify the information. The information was obtained from anonymous sources from the Hawks and SARS about the investigation against Julius Malema. Although the newspaper saw these sources as reliable, failure to adequately check the allegations presents as unprofessionalism on the part of the newspaper.

Due to inadequate checking being carried out, mere allegations of an investigation were reported as fact. The challenge faced by newspapers as in this case is the ability to adequately verify information while working under pressure to reach deadlines. Newspapers can become preoccupied with the need to break news stories before other newspapers do thus it becomes a challenge to hold a story and not publish it right away so as to conduct more checks on the information that has been obtained. This factor contributes to a decline in news quality, given that newspapers can become focused on completing news stories and publishing them quickly and less time is given to produce more accurate and in-depth stories with verified information from more independent sources.

[62] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[63] Interview, Key informant from the office of the Press Ombudsman, Johannesburg, 2012-11-09.

As was discussed in the previous chapter, despite the pressure that newspapers may be faced with, there are still steps taken to check and ensure accuracy of news stories prior to publishing. Having said that, this particular case demonstrates that the checking processes in the production of news may not be adequate to ensure accurate news reporting. The processes may be in place but once the editor is satisfied with the news stories they may give the go ahead to print even though there may possibly be some contesting issues. In this case, the editor is said to have agreed with the use of the anonymous sources. This draws into the theme of managerial control which I will now discuss in relation to this case.

As newspapers are faced with pressure given that they have to compete with news that is readily available on the internet, it becomes more challenging to adhere to the standards of reporting set by the Press Code. As Bourdieu argues, economic pressures can weigh on the field of journalism and affect its cultural capital as original reporting becomes affected by the rush to meet deadlines and sell newspapers. Thus, this further points out to the tension that has been elaborated on in this paper. This is the fact that the need to keep profits high can affect that of maintaining professionalism, in the end resulting in inaccurate reporting.

*f) Managerial Control in News production*

The editor has the final say of what gets published in the newspaper. He/she is the final eye before the paper can be sent to print. Thus, when the editor gives the go- ahead on a story, the story gets published. One key informant interviewed for this particular case held that:

*"The issue of the two unnamed sources; these were two completely different people. I told the editor, she knew that and she was happy with it…The editor was with me when we published the story so she knows the ins and outs, I sat with the editor, we went through absolutely everything and she gave the green light. "*[64]

This shows that once the editor checks the story and is satisfied with it, it can then get published. This case thus demonstrates management control in the labour process as management has the final say of the final product that gets published. The use of anonymous sources was approved by the editor despite the information not being verified. Editors have power in the production of news and as a result should ensure that they maintain professionalism in news reporting. The challenge arises with newspapers competing in the rush to break news stories and in the process of this, accuracy measures could be inadequately carried out. It was the responsibility of the editor to make sure that the allegations from the anonymous sources had been verified as facts by the journalist in charge of the story prior to giving the go ahead to publishing the story. Failure to verify the accuracy of the information led to unnecessary harm being caused to the complainant.

*Case Study Two*

*a) Manie Van Schalkwyk Vs. Sunday Independent*

i. *Outline of the Case*

Credit Ombudsman, Manie Van Schalkwyk complained about a story in the Sunday Independent published on the 21st August 2011. The story involved a complaint by the debt counsellor Reginald Matjokana against the complainant, Manie Van Schalkwyk for conflict of interest that he lodged with the public prosecutor and the Hawks.

The headline of the story was found to be misleading and not a reflection of the content of the story. The headline was "*Allegations of a conflict of interest and corruption against credit Ombudsman*." Manie complained that this was a misinterpretation of the story and that the headline was damaging to his reputation. The newspaper argued that the inclusion of the words *and corruption* to the headline was an innocent error made by subeditors in the unfortunate rush to meet deadline. The editor of the Sunday Independent denied that the error was intentional and meant to sensationalize the story and was willing to apologise for the error.

The headline was found to be in breach of Article 5.1 Of the Press Code that states that „headlines shall give a reasonable reflection of the contents of the report in question." In addition, Van Schalkwyk was not accused of corruption thus the use of that word was found to be untruthful and unfair and inaccurate and in breach of Article 1.1 of the Press Code which requires newspapers to report news truthfully, accurately and fairly.

*b) Analysis of Case Study*

i. *Pressure in news production*

It is worth noting that newspapers are faced with pressure in news production as they have to meet deadlines with publishing news stories and are in constant competition with more immediate news sources as has been pointed out. Daily newspapers are faced with more pressure as they have less time to investigate on and write news stories. Although weekly newspapers have more time to meet deadline, they have to produce more in-depth and more analytic stories to Daily newspapers as most of the stories they cover would have already been broken by the time the weekly newspapers are published.

In this case, as has been mentioned above, the newspaper argued that the inclusion of the words *and corruption* to the headline had been an innocent error made by subeditors in the rush to meet deadlines.

[64] Interview, Journalist from a Daily Newspaper, Johannesburg, 2012-11-27.

Despite the fact that the newspaper may have been faced with pressure, professionalism should still have been maintained which would have entailed ensuring that all necessary checks were done to make sure headlines and news content are accurate. The subeditors in this case had the responsibility to make sure the headlines portrayed the actual news story, failure to which they would get blamed. As one key informant responsible for writing the story held:

*"It was written by the subeditors so it has nothing to do with me, they write the headlines."*[65]

The newspaper should have given more time to the checking of news stories including that of headlines prior to publishing the story. Thus, pressure in news production does impact on the quality of news that newspapers produce as there is a rush to meet deadline and break news stories. In the process of this urgency, some quality checks may be lost along the way. This may moreover demonstrate the tension that newspapers face between producing news so as to sell and make profits while on the other hand also ensuring that all necessary checks are conducted to ensure that news produced adheres to the set standards of professionalism.

It is the onus of the newspaper and ultimately the editor who is in charge of the news stories to ensure that enough checks are conducted to ensure that news that is published maintains the standards set by the Press Code.

The pressure that newspapers face in the rush to meet deadlines as in this particular case demonstrates the contradictions inherent in the labour process theory. Technological developments in the newsroom, more specifically the internet assist journalists to be able to meet deadlines, for instance they can phone sources to confirm information, receive documents via email and also use the web to confirm spellings and other names. On the other hand, the developments brought about by the internet which has resulted in the immediacy of news and news being freely available online is the major reason why newspapers are undergoing pressures in news production. Newspapers are under pressure as they now have to compete with online news sources, they need to maintain the interests of their readers, remain relevant in an increasingly digital age and continue to maintain profits.

*c) Sensationalism*

Headlines may sometimes be constructed in such a way as to sensationalize news stories. An appealing headline can entice readers" interest in buying and reading news stories. However, when a particular headline misrepresents the story being reported on as in this particular Case study, then it becomes a reflection of inaccurate reporting which goes against the Press Code. As was discussed in the previous chapter, sensationalizing news stories does have an impact on accurate news reporting as it could end up in an inaccurate or exaggerated picture being given to the news story.

The addition of the word "corruption" to the headline may have been an "innocent error" as the newspaper pointed out. However, it may well have been sensationalism of the matter or to make the story more appealing to readers.

Sensationalizing news headlines is a means by newspapers to sell and continue to make profits. The tension between maintaining professionalism and keeping profits is visible in this regard. If headlines are sensationalized, news may be made to sound interesting and may attract more readers, however, sensationalism, as in this case may result in news being inaccurate thereby impacting on the professionalism required from news production.

*Case Study Three*

*a) Khaya Ngqula Vs. Sunday Times*

i. *Outline of the Case*

In this case, former CEO of South African Airways complained about two stories in the Sunday Times published on 5 December 2010 written by Brendan Peacock and Robert Laing. The stories were headlined "*Fat-cat parastatal bosses come and go, but they get the cream.*" And "*Getting paid to go away-Robert Laing introduces the boys who made a mint out of quitting.*" The complaint is that both stories portray Ngqula as a failure as he had failed to comply with his duties while being CEO of the SAA and the second story untruthfully states that he was sacked. Ngqula held that these stories were humiliating considering he had been commended for doing an outstanding job as the CEO of SAA.

The Sunday Times" findings were based on the KPMG report which is a global network of professional services firms providing audit, tax and advisory services. At the time that these stories were published, the findings from the KPMG report were unproven allegations. The Sunday Times held that reputable media such as The Mail and Guardian and Fin 24 had also reported that Ngqula had been fired. It was found that Ngqula was not fired, there was a settlement agreement between him and SAA thus the newspapers should have followed a proper process of verification. There was a breach of Article 1.1 of the Press Code which is outlined in the previous case. In addition, given that the findings from the KPMG report were mere allegations at the time of publication, it was incorrect to state it as fact that Khaya Ngqula was a failure. For this, the newspaper was also found to be in breach of Article 1.1 of the Press Code.

[65] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

*b) Analysis of Case Study*

i. *News Sources*

The allegations that were reported as facts in the news story were based on findings from the KPMG report which is a source that had not been tested for accuracy. KPMG was thus not a source that the newspaper could have relied on to publish a news story portraying Khaya Ngqula as a failure. Reporting allegations as fact results in inaccurate news reporting as in this case study given that the allegations had not been proved. Use of secondary sources of news by newspapers can have an impact on the quality of news produced if the information from the sources has not been verified from reliable independent sources. :

Using what other newspapers have reported as a source of information also impacts on the quality of news produced. As was precisely held by the Deputy Press Ombudsman during the hearing of this case:

*"The mere fact that other newspapers reported that Ngqula had been fired is no proof that that was in fact true."*

Thus, newspapers need to independently verify information and not base news stories on what other media has published. The use of primary sources to verify information is crucial to maintaining accuracy in news reporting.

As Bourdieu"s field theory illustrates, the formal rules of the field can be changed by agents" actions in their spaces of possibilities. In this case, the newspaper went against the formal rules of the field set by the Press Code and made use of a secondary source as well as the fact that other newspapers had published the same information and hence published the news story as it was. The formal rules of the field require newspapers to always ensure that information from secondary sources is verified prior to news being published. However, journalism is a competitive field and newspapers may feel the need to run with a story just because other rival newspapers have published it and may feel they also need to offer their readers something on the news story in order to sell. Newspapers demonstrate their sense of agency by choosing the news sources that they perceive to be effective in providing them with information that aids in producing breaking news stories that attract more readership and are profitable for the publisher.

*c) Managerial control in news production*

This case additionally demonstrates how news stories can occasionally get changed during the editorial process. This is after journalists have submitted the news stories that they would have been working on to the News desk or to the news editors. The editor has the final say over what gets published in the newspaper and thus has the authority to change content on news stories that have been written. As it appears from this case, the journalist may not always be contacted about the additions or changes made to the story. One key informant interviewed who partook in writing the news stories held that the news story got changed by the editor hence it ending up being inaccurate by the time of publishing. The key informant stated the following:

*"Initially, the story stated that: Khaya Ngqula left the organization after which the story was changed to: he was fired…"*[66]

The editor has the final say on what gets published in the newspaper as has been pointed out. Thus, once editors have gone through the news stories and made changes as they see fit they give a go ahead for the newspaper to go to print. The journalists involved in writing news stories have no ability to make further editions to the paper at that stage. There is ambiguity as to whether journalists have the ability to follow up and double check on their news stories prior to being sent to print. The key informant further held that:

*"I don"t know if I would have had the power to change it, but there is built into the process a second check by the journalist…because it goes out in your name, it"s your responsibility to check the story because some of the changes made could have been wrong."*[67]

Thus, journalists may not necessarily always be aware of the sort of changes that can be made to the news stories they would have written prior to publishing. As the editor has the final say, he/she may decide to contact the journalist to confirm the changes made or may not do so. During the editing process, important information can be lost from news stories and this can have an impact on the accuracy of the news produced.

*One key informant stated that:*

*"Nearly every story can be cut because of space and important information can be lost."*[68]

I think it would be of importance to always check with the journalists responsible for stories prior to making any final changes to the content of news stories. In this case, the journalist had been working on the story and had the evidence to suggest that Khaya Ngqula had been offered a settlement agreement. However, as the editor has the power in news production, he changed the statement to what he had understood it to be and as the editor is the face of the newspaper, changes made are at his/her discretion.

Labour process theory illustrates the increased separation between conception and execution as a form of control by management. Workers do not have direct engagement in the labour process. As this case

[66] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[67] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

[68] Interview, Journalist from a Weekly Newspaper, Johannesburg, 2012-11-26.

demonstrates, journalists are responsible for the process of news gathering and writing news stories, however management may exclude them from planning and finalizing news stories in preparation for print. This shows that management is in control of the news production process. The editor has agency and decides whether or not to check with journalists prior to making changes to their news stories or as in this case the journalist may not know of the changes made until the newspaper is published.

*d) Competition between newspapers*

As this case demonstrates, competition exists between newspapers to write and publish breaking stories first as the discussion on „competition" in the previous chapter shows. Thus, once one newspaper broke the story on Khaya Ngqula‟s failure and him being fired, this was a trigger for other newspapers to also write on that and attempt to bring a new angle to that story. This is visible from the labour process of news production. When journalists and editors meet to discuss news stories for the day or week, reference is made to other newspapers. Thus, stories that have been published by other newspapers are then followed up on. In the midst of this competition between newspapers, the importance of verifying the accuracy of information prior to reporting it as news still remains. By using reliable, Independent sources and verifying information that has been published as well as adhering to all other standards of news reporting set by the Press Code, newspapers can achieve more accurate news reporting and also earn public respect.

The competition between newspapers as outlined by this case could be explained by Burawoy‟s theory on the labour process which sees workers as having some autonomy which allows them to invest in labour by constituting work as a game. In the same way, by newspapers being in competition, journalists can thrive in their news reporting tasks to ensure that they come up with good story ideas and breaking news for their particular newspapers. Journalists may strive to ensure that their newspaper maintains high standards in reporting and that the newspaper‟s brand is well preserved in the public. As newspapers compete as a whole to break news stories, journalists are also in competition as individuals as coming up with breaking news stories gives them personal satisfaction while also aiding in achieving management‟s profit motive.

*Case Study Four*

*a) Mathews Phosa And The Anc Vs. City Press*

i. *Outline of the Case*

The ANC treasurer-general Dr Mathews Phosa and the ANC complained about a front page story in the City Press written on August 16, 2009, headlined "*Phosa tries to muzzle City Press*." The story held that Phosa tried to stop the City Press from publishing allegations regarding his responsibility in leaking information that may have damaged Deputy President Kgalema Motlanthe from becoming President Jacob Zuma‟s successor in 2012.

Phosa complained that the City Press had contacted him too late for comment despite the fact that the journalist had been working on the story for some time. This was found to be in breach of Article 1.1 of the Press Code which stipulates that "The Press shall be obliged to report news truthfully, accurately and fairly." The newspaper denied not having offered Phosa a reasonable opportunity to comment.

The first part of the introduction of the story held that Mathews Phosa had mounted an eleventh-hour bid to try and stop the City Press from publishing the story. This statement was found to be unfair as it was not balanced with that Phosa had only been contacted at the eleventh hour. The newspaper was thus found to be in breach of Article 1.1 of The Press Code( as stipulated above) and Article 1.2.2 which states that "News shall be presented in context and in a balanced manner, without any intentional or negligent departure from the facts (whether) by omissions…"

The newspaper made use of anonymous sources in the story and did not state their number, credibility and their independence. As a result, it was found to be in breach of Article 1.4 of the Press Code: "When there is a reason to doubt the accuracy of a report and it is practicable to verify the accuracy thereof, it shall be verified. Where it has not been practicable to verify the accuracy of a report, this shall be mentioned in such a report." The posters referring to the story read: "Now it‟s Phosa vs. Motlanthe" which was found to have been the newspaper‟s opinion being presented as fact. This was in breach of Article 5.2 of the Press Code: "Posters shall not mislead the public."

*b) Analysis of Case Study*

i. *Lack of professionalism*

The newspaper demonstrated lack of professionalism in its failure to contact the main subject of the news story on time. Mathew Phosa was not given a reasonable opportunity to comment on the news story which as evidence shows, the journalist had been working on for some time. Thus, failure to contact the main subject of the story on time was not an issue of pressure in production given that it was apparent that the journalist responsible for the story had started working on it several days prior to publication. The newspaper was unfair to Phosa; the main subject of the story, by not offering him ample time to respond yet evidence showed that the newspaper had been in contact with other members of the ANC about the story.

The newspaper, additionally failed to report a balanced account of the story as it reported on "Phosa‟s eleventh hour bid to stop City Press from publishing the story." Having reported that, the newspaper omitted the fact that Phosa had only been contacted in the eleventh hour which showed a negligent departure from the facts by the newspaper. This form of unbalanced reporting could have been as a result of the newspaper attempting to serve its own personal agendas from the news story. A further possibility may have been the reporter of the story acting as an agent for forces within the ANC that may have been opposed to Mathews Phosa. This unbalanced reporting was unnecessary and unfair to the subject of the story who had a right to have sufficient time to respond to the contents of the story. This nature of lack of professionalism in news reporting can lead to a decline in accurate news reporting. These errors can be avoided by newspapers to avoid causing unnecessary harm to people and also to ensure the adherence to the standards of reporting set by the Press Code.

This case demonstrates the argument which has been raised in this paper before; that of newspapers" lapse in professional reporting as they strive to still remain relevant to readers and stay in business. Newspapers may fall more towards the focus on news as a commodity which needs to sell and lose focus on the crucial aspect of the role of news as a public good that has to be produced in a manner that adheres to the standards of ethical reporting set by the Press Code. Failure to adhere to the requirements expected of accurate reporting has consequences of newspapers being sent to the Press Ombudsman and being given penalties which could affect their reputation.

*c) News sources*

The accuracy of the news story was additionally affected by failure of the newspaper to verify the accuracy of the sources that were used for the news story. Anonymous sources were used upon which no credibility or independence was mentioned in the report. This omission results in doubts over the independence of the sources used in the story thus the reliability of the information reported on becomes questionable to the public. Thus to ensure that newspapers adhere to the standards of accuracy set by the Press Code, reliability and independence of sources should be shown and no reason should be left to doubt the accuracy of a report. In cases where it is not possible to verify accuracy of a report, it is the onus of the newspaper to indicate that.

The failure to verify the accuracy of news sources demonstrates a lack of professionalism by the newspaper. This provides a demonstration of the profit motive weakening professionalism in news reporting. When professionalism in news reporting is compromised to sell newspapers, the result is weakening of cultural capital within the field of journalism given that there is less original and in-depth reporting.

*d) Sensationalism*

The use of the newspaper"s opinion and portraying it as fact on the newspaper posters could have been sensationalism of the news headline. "*Now it"s Phosa vs. Motlanthe*" was displayed on the posters referring to the news story yet the contested relationship between Motlanthe and Phosa was based on opinion and had not been verified. The poster headline is „catchy" and could have been used to draw more readers" interest in reading the story.

This sort of departure from accuracy by sensationalizing headlines on posters can be misleading to readers and may not be a true portrayal of the actual news story. This thus supports the argument that has been made on sensationalism in this paper; that sensationalising news can result in a departure from the truth in news stories and hence impacts on accurate news reporting.

As has been illustrated previously in this paper, sensationalism of news illustrates the conflict between the formal rules in the field of journalism, namely adhering to the Press Code and the informal rules which enable newspapers to continue to make profits. Sensationalizing news is a means to ensure that news that is produced is marketable to the public.

To conclude, by studying practical cases of inaccurate reporting by different newspapers this chapter has illustrated the nature of errors that take place in the production of news. As newspapers compete with online news sources and strive to remain profitable, a challenge arises in ensuring that all accuracy checks are conducted effectively and that news is produced in a professional manner for the public. The following chapter concludes the paper by providing an overall summary of the findings as well as outlining various means in which newspapers can demonstrate agency and attempt to avoid errors in news reporting.

## Chapter Seven

## VII. Concluding Remarks

The study started out by looking at news as a commodity with the need to generate profit for newspapers as well as being a public good which is essential to democracy and whose reportage needs to adhere to the standards set by the Press Code. Labour process theory was applied to understand how news is produced as a commodity while field theory was used to enable further understanding on how news is also produced as a public good.

It is of importance that news, as a public good be reported professionally to ensure that citizens are well informed. As the findings in this study have shown, newspapers can be proactive and adapt to the digital era and still remain professional and maintain their relevance to readers. However, the tension between maintaining professionalism and making profit remains difficult to resolve. Newspapers face challenges with their profitability models as news becomes de-commodified and readily available on the internet. With increased pressure to produce on more news platforms and attempts to cut costs and maintain relevance to readers, accuracy checks may be compromised, sometimes resulting in reporting news inaccurately or unprofessionally. Profitability tends to impose constraints on production of news. As has been shown in this paper, the need to make profit by newspapers may result in a focus on news that is attractive to readers which in some cases may lack accuracy. For instance, news may become more sensationalized and more emphasis may be placed on reporting on politics and personal lives of politicians or celebrities as this is seen as news that is attractive to readers and that may sell.

To understand the tension between news as a commodity vs. news as a public good I looked at four case studies in which different newspapers were reported to the Press Ombudsman for breaching the Press Code in news reporting. These cases illustrate that newspapers have room for agency and they can take steps to avoid the errors made in news reporting, primarily by conducting thorough accuracy checks and ensuring adherence to the Press Code prior to sending stories to print. The following table summarizes the findings from the case studies showing the nature of faults made by newspapers in the production of news.

*Table 1:* Summary of findings from case studies

| Case Study | Reasons for newspaper's faults |
|---|---|
| 1. Julius Malema vs. The Times | Failure to adequately contact sources for comment<br>Sensationalism of news<br>Inadequate means to verify accuracy of information<br>Managerial control in news production |
| 2. Manie Van Schalkwyk vs. Sunday Independent | Pressure in news production<br>Sensationalism of news headlines |
| 3. Khaya Ngqula vs. Sunday Times | Use of unreliable news sources<br>Placing reliance on what other newspapers have published as fact<br>Managerial control in news production<br>Competition between newspapers |
| 4. Mathews Phosa and the ANC vs. City Press | Lack of professionalism in news reporting<br>Failure to verify accuracy of news sources<br>Sensationalism of news |

Although one cannot generalise from the findings of the case studies selected, certainly these case studies elaborate on some of the major challenges that newspapers face in producing news accurately as discussed in chapters four and five. As the table shows, the challenge faced by newspapers in contacting sources and being able to adequately verify their independence and accuracy is a major concern. Additionally, sensationalism of news stood out to be a major concern from the case studies. This elaborates the argument raised above of the tension that newspapers face i.e. being able to report news professionally without surrendering to the need to make profits. By surrendering to the profit motive, news becomes packaged in such a way as to sell to the readers with the standards of accuracy expected from news reporting being lost along the way.

The challenges that newspapers face in news production relate back to the restructuring taking place in newsrooms that has been discussed above. With the need to produce quicker and compete with the immediacy and free news available online, newspapers are under pressure to stay relevant to readers and continue to produce news professionally while on the other hand, their profit model is under threat. With the need to come up with breaking news first, newspapers aim to produce news quicker, this is enhanced by the technological developments available in the newsroom such as the internet which enhance production. Within the labour process of news production which is primarily marked with high pressure and demands, newspapers can fail to adequately check and verify accuracy of news reports in the rush to meet deadline. As the case studies above have shown, inability to adequately verify information given by news sources can result in inaccurate reporting. Newspapers thus face a challenge of time constraints and the need to take the right steps to contact relevant sources adequately and make sure that all news is in accordance with the standards set by the Press Code prior to publishing.

The editor has the final say of what goes into the newspaper and as has been shown in the case studies above, stories can get changed without journalists being consulted about the changes made to their news stories. It is thus the onus of sub editors and editors to ensure that they contact relevant journalists and verify that changes that are being made to news stories do not result in a compromise on the accuracy of the news stories.

*a) Newspapers' room for agency in ensuring effective news production*

I will now go on to discuss the various steps that newspapers can take to avoid the nature of errors that occur in news production. As has been pointed out, newspapers are not passive, they have agency and can make decisions with regards to how to best produce news. News production is more complex than the rush to make profits. Newspapers seek to report news accurately and achieve high standards and seek to remain relevant and commendable to their readers. I am in agreement with Des Freedman (2010) on the point that news organizations are not about to lose their large numbers of readership as long as they continue to invest in original journalism and continue to look for ways to make themselves relevant to their readers.

There is need to ensure that the profit motive of newspapers does not interfere with original in-depth accurate news reporting as this could result in readers losing trust in media‟s role in serving democracy . This is a major challenge as has been pointed out in this paper. Newspapers may be faced with financial strain as they may not have found an effective online business model for news production and also as they may have lost some readers and advertisers to the internet. As a result, the main focus could shift to trying to accumulate as much revenue from newspaper sales and advertising hence resulting in the possibility of accuracy and professionalism ceasing to be the primary focus. Lauren Fine (2012) suggests the need for newspapers to also adapt their advertising to digital media as an attempt to ensure that the bulk of revenue obtained by news corporations continues to come from advertising. This is because a dependence on revenue from news content and sale of newspapers could result in news quality being compromised given that there may be overemphasis on producing news that sells as opposed to maintaining high standards in reporting. She further sees the need to upgrade News Corporations‟ sales/ advertising departments so as to improve the advertising revenue and as a result avoid dependence on newspaper circulation for revenue.

It is important for journalists to create much more engaging, navigable, contextualised reports that tell the day‟s events more accurately, fully and dynamically (Pavlik, 2001). Journalists should avoid over reliance on the web as a source of news, instead news reporting needs to involve going out to where events that are news worthy are occurring, speaking to people involved and obtaining more in-depth accounts to make the public better informed. Information obtained online by journalists needs to be evaluated given that in some instances information available on the internet can be inaccurate and misleading.

As has been mentioned in this paper, there is need for more investment in training in journalism to ensure that news is reported in a more professional manner. Des Freedman (2010) sees under investment as being a major threat to journalism. He suggests that the future of news depends on investment in technology, in resources and in journalists themselves. Steyn and De Beer (2004) further suggest that future training and education in journalism should take cognisance of the scope and impact of the social, economic, political, economic and technological factors shaping and transforming the media industry. The needs of new media audiences should be addressed. With the introduction of digital technologies in the newsroom and increased use of the internet as a tool for news reporting, it is essential to ensure that journalists are well trained to use the latest technology and the internet appropriately for news reporting.

As was pointed out during interviews with key informants, it is essential to improve the standards of journalism training in some institutions. Students training to be journalists should be given extensive training on the application of media ethics in news reporting. It is important for journalists to understand the importance of the Press Code and its proper application. Several media organizations take junior journalists through an internship programme before being officially recruited to a newspaper and being allowed to publish news stories. Internship programmes are beneficial to new journalists given that they receive practical training which helps prepare them for the pressures and challenges present in the production of news It is important for journalists to take personal responsibility and accountability for stories they publish as news, they need to check and recheck their work prior to submitting their news stories as is done in the accuracy form mentioned above which is used by some newspapers to ensure accurate reporting by journalists. Moreover, sub editors and news editors should verify that all changes made to news stories do not in any way compromise accuracy in news reporting. In addition, newsrooms need to make further use of technological developments to meet the demands of deadlines. Technology has a lot to offer to make the process of news production more effective and productive. For instance, before the newspaper goes to print, journalists and editors can all be online on their laptops or I Pads to ensure that if there is any misunderstanding on a news story, such issues can immediately be clarified with the journalist(s) involved.

A suggestion for further research would be the further exploration of how best news organizations can make use of technological developments to be able to effectively manage the demands of news production and publishing deadlines while still ensuring professionalism in news reporting

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# Appendices

## Appendix 1: Research Questionnaires

*QUESTIONNAIRE GUIDE: Interview Guide: Editors/ Journalists*

- For how long have you been in your position?
- What sort of job training and mentoring did you have to undergo in your career in journalism?
- What is your role in the production of news?
- What standards does the newspaper set to ensure that you report news accurately and fairly to the public?
- What is your view on the Press code in terms of its applicability and reasonableness to the production of news? and how do you practice it as a newspaper?
- What challenges does the newspaper face in the production of news?
- Do you think the restructuring taking place in newsrooms (PROBE) impacts on the quality of news that you produce?
- What other factors may have an impact on accurate news reporting in the South African print media?
- What are your most memorable cases that have been directed to the Press ombudsman by the public?
- Do you think these cases were dealt with fairly?
- How was the image of the newspaper changed after the relevant case(s)?
- Is the newspaper handling reporting any differently after complaints being sent to the Press ombudsman?

*QUESTIONNAIRE GUIDE: Press Ombudsman's Office*

- What sort of news complaints does the Press Ombudsman deal with?
- What measures are put in place to ensure that newspapers adhere to the
- Press code?
- What is the procedure after newspapers are found to have been in breach of the Press Code in their reporting? Is there a penalty fee that they have to pay? Does this procedure aid in better news reporting?
- In your view, are the news stories that are brought to the Press ombudsman a
- true reflection of print media"s lapse in accurate reporting?
- Can we attribute the diminishing quality of news in SA Print media to the restructuring that newsrooms have been experiencing? (PROBE)

a. Managerial control over news production
b. Increased use of technology
c. Pressure to produce news quicker
d. Less staff
e. Use of news agencies
f. Juniorisation

- Technological advancements are argued to contribute largely to newsrooms having to restructure and find means to cut costs while still maintaining profits (labour process theory) what impact does technology have on quality of news produced?
- What other factors do you think contribute to newspapers reporting news that does not adhere to the Press Code
- How does the Press ombudsman reinforce the Press Code?
- What are the challenges that are faced in enforcing print media ethics and responsible reporting?
- What do you think can be done to improve the quality of news that is published by the SA print media?

## Appendix 2: Consent Form

University Of Pretoria
Department Of Sociogy

*Consent Form*

*Research Question:* To what extent does the restructuring in the field of journalism impact on accurate news reporting? A Case Study analysis of print media in South Africa

*Researcher:* Sibonile Linda Khumalo

I Agree To Participate In This Study. I Realise That This Information Will Be Used For Educational Purposes. I Understand That I May Withdraw From This Study At Any Time And That All Information Will Be Treated With Confidentiality And Anonimity. I Understand The Intent Of This Study.

Signed:

Date:

## Appendix 3: The South African Press Code

*Preamble*

*Whereas:*

Section 16 of the Constitution of the Republic of South Africa enshrines the right to freedom of expression as follows:
(1) Everyone has the right to freedom of expression, which includes:
(a) Freedom of the press and other media;
(b) Freedom to receive or impart information or ideas;
(c) Freedom of artistic creativity; and
(d) Academic freedom and freedom of scientific research.
(2) The right in subsection (1) does not extend to
(a) Propaganda for war;
(b) Incitement of imminent violence; or
(c) Advocacy of hatred that is based on race, ethnicity, gender or religion, and that constitutes incitement to cause harm. The basic principle to be upheld is that the freedom of the press is indivisible from and subject to the same rights and duties as that of the individual and rests on the public's fundamental right to be informed and freely to receive and to disseminate opinions; and The primary purpose of gathering and distributing news and opinion is to serve society by informing citizens and enabling them to make informed judgments on the issues of the time; and The freedom of the press allows for an independent scrutiny to bear on the forces that shape society.

*Now Therefore:*

The Press Council of South Africa accepts the following Code which will guide the South African Press Ombudsman and the South African Press Appeals Panel to reach decisions on complaints from the public after publication of the relevant material. Furthermore, the Press Council of South Africa is hereby constituted as a self-regulatory mechanism to provide impartial, expeditious and cost-effective arbitration to settle complaints based on and arising from this Code.

*Definition*

For purposes of this Code, “child pornography" shall mean: “Any image or any description of a person, real or simulated, who is or who is depicted or described as being, under the age of 18 years, engaged in sexual conduct; participating in or assisting another person to participate in sexual conduct; or showing or describing the body or parts of the body of the person in a manner or circumstances which, in context, amounts to sexual exploitation, or in a manner capable of being used for purposes of sexual exploitation."

1. Reporting of News

1.1 The press shall be obliged to report news truthfully, accurately and fairly.
1.2 News shall be presented in context and in a balanced manner, without any intentional or negligent departure from the facts whether by:
1.2.1 Distortion, exaggeration or misrepresentation; 94
1.2.2 Material omissions; or
1.2.3 Summarisation.
1.3 Only what may reasonably be true, having regard to the sources of the news, may be presented as fact, and such facts shall be published fairly with due regard to context and importance. Where a report is not based on facts or is founded on opinions, allegation, rumour or supposition, it shall be presented in such manner as to indicate this clearly.
1.4 Where there is reason to doubt the accuracy of a report and it is practicable to verify the accuracy thereof, it shall be verified. Where it has not been practicable to verify the accuracy of a report, this shall be mentioned in such report.
1.5 A publication should usually seek the views of the subject of serious critical reportage in advance of publication; provided that this need not be done where the publication has reasonable grounds for believing that by doing so it would be prevented from publishing the report or where evidence might be destroyed or witnesses intimidated.
1.6 A publication should make amends for publishing information or comment that is found to be inaccurate by printing, promptly and with appropriate prominence, a retraction, correction or explanation.
1.7 Reports, photographs or sketches relative to matters involving indecency or obscenity shall be presented with due sensitivity towards the prevailing moral climate.
1.7.1 A visual presentation of sexual conduct may not be published, unless a legitimate public interest dictates otherwise.
1.7.2 Child pornography shall not be published.
1.8 The identity of rape victims and victims of sexual violence shall not be published without the consent of the victim.
1.9 News obtained by dishonest or unfair means, or the publication of which would involve a breach of confidence, should not be published unless a legitimate public interest dictates otherwise.
1.10 In both news and comment the press shall exercise exceptional care and consideration in matters involving the private lives and concerns of individuals, bearing in mind that any right to privacy may be overridden only by a legitimate public interest.

2. Discrimination and Hate Speech

2.1 The press should avoid discriminatory or denigratory references to people's race, colour, ethnicity, religion, gender, sexual orientation or preference, physical or mental disability or illness, or age.
2.2 The press should not refer to a person's race, colour, ethnicity, religion, gender, sexual orientation or preference, physical or mental illness in a prejudicial or pejorative context except where it is strictly relevant to the matter reported or adds significantly to readers' understanding of that matter.
2.3 The press has the right and indeed the duty to report and comment on all matters of legitimate public interest. This right and duty must, however, be balanced against the obligation not to publish material which amounts to hate speech.

3. Advocacy A publication is justified in strongly advocating its own views on controversial topics provided that it treats its readers fairly by:

3.1 Making fact and opinion clearly distinguishable;
3.2 Not misrepresenting or suppressing relevant facts;
3.4 Not distorting the facts in text or headlines.

4. Comment

4.1 The press shall be entitled to comment upon or criticise any actions or events of public importance provided such comments or criticisms are fairly and honestly made.
4.2 Comment by the press shall be presented in such manner that it appears clearly that it is comment, and shall be made on facts truly stated or fairly indicated and referred to.
4.3 Comment by the press shall be an honest expression of opinion, without malice or dishonest motives, and shall take fair account of all available facts which are material to the matter commented upon.

5. Headlines, Posters, Pictures and Captions

5.1 Headlines and captions to pictures shall give a reasonable reflection of the contents of the report or picture in question.
5.2 Posters shall not mislead the public and shall give a reasonable reflection of the contents of the reports in question.
5.3 Pictures shall not misrepresent or mislead nor be manipulated to do so.

6. Confidential Sources The press has an obligation to protect confidential sources of information.

7. Payment for Articles No payment shall be made for feature articles to persons engaged in crime or other notorious misbehaviour, or to convicted persons or their associates, including family, friends, neighbours and colleagues, except where the material concerned ought to be published in the public interest and the payment is necessary for this to be done.

8. Violence Due care and responsibility shall be exercised by the press with regard to the presentation of brutality, violence and atrocities.

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# The Possible Effect of Adult Functional Literacy Education on Farmer Production in Kersa Woreda; South Western Ethiopia

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*Abstract-* This paper deals with the impacts of functional adult literacy education on farmer's production. Identifying the means through which functional adult literacy increases and/or decreases farmers' production, and finding out associated advantages and negative side of the program are the objectives of the study. In depth interview was used to collect primary data from purposively selected respondents. Besides the secondary data were also collected from secondary sources to strengthen the findings of the paper. There by qualitatively analyzed results show that being provided functional adult literacy in the study area through cooperation of health, education and agricultural sectors, one to five productive army farmers, and mobilization by benefits and increment of participants has a lot of advantages such aseconomic growth, human, social, and physical capitals development, and social services development. However, lack of contextualizing the program, lack of some community's members willingness, lack of standard materials, and low emphasize from other sectors are considered as the problems associated the role of functional adult literacy in boosting farmers' production. Thus, making this program as anintegrative issue for all ministries and developing policy accordingly may results in stated goals of our country to reach at middle income countries by boosting the participation of small holder farmers in agricultural and rural development.

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*Strictly as per the compliance and regulations of:*

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## Chapter One

## I. Background of the Study

### a) Introduction

Economic benefits of schooling include the potential to obtain paid employment or to generate income through self-employment using skills learned in school. Education may enhance farm productivity directly by improving the quality of labor, by increasing the ability to adjust to disequilibria, and through its effect upon the propensity to successfully adopt innovations. Education is thought to be most important to farm production in a rapidly changing technological or economic environment (Shultz 1964: 1975).

However, at the world level, there are about 781 million illiterate adults. The rate of illiteracy is likely to have dropped slightly from 18% in 2000 to 14% in 2015, which means that the Dakar target of halving illiteracy has not been achieved. Only 17 out of 73 countries with a literacy rate below 95% in 2000 halved their illiteracy rate by 2015. Then it means there is such huge number of living reasons for literacy. While changes in daily life such as mobile technology may increase demand for the acquisition of literacy skills, their impact on literacy outcomes has not yet been shown (UNESCO 2015).

UNESCO defines a functionally literate person as any person 15 or older who can" read and write a simple statement on his everyday life "(UNESCO 1993), the world development report (1997) also adopts this definition of functional literacy. More recently, UNESCO (2005a) considered literacy as the ability to 'identify, understand, interpret, create, communicate and compute using printed and written materials' associated with varied contexts. Today, literacy is seen as a continuum of skills that enables individuals to achieve their goals in work and life and participate fully in society, a point confirmed by the international community in the 2009 Belém Framework for Action (UIL 2010).

Others propose a broader and more explicitly political definition. According to Okech (2006) the concept of functional literacy has undergone several transformations. According to Karl Marx, it is a means of combating the alienation of man from economic activity, and it leads to improved knowledge, health and skills, better organization and management of one's life (Smith 2002).

According to Green in Fordham (1983), illiteracy reduces workers flexibility and productivity even in "simple" occupations such as peasant farming, construction or handicraft. Kasam Y.(1979) discusses that the ability to read and write is increasingly indispensable for living in all societies. The role of literacy in individual and social development is not simply a notion in the mind of a planner or an economist, but a means by which millions of individuals can transform both themselves and their societies. In this regard, many African countries including Ethiopia have hardly satisfactory and sustainable literacy programs.

The determinants of literacy vary depending on the socio economic context of the country. A study made by Lavy, Spart and Leboucher (1995) indicated that age, sex and geographic location are the determinants which inter play in literacy activity.

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According to this study, illiteracy is more widespread among females than their counter parts; higher in rural areas than the urban; and inversely correlated with age. On the other hand Verner (1999) analyzed the determinants of worldwide literacy rates by applying a human capital framework. She finds that enrollment rates, average years of schooling of adults and life expectancy at birth are the main determinants of literary.

Ethiopia is one of the African countries with long tradition of basic literacy practice. Since the days of king Ezana (4th century A.D) religious related literacy practices have been persistently taking place in the country particularly in the northern and central highlands. While the continuous state initiated attempts to fighting against illiteracy dates back to early 18thcentury, Ethiopia is still known as the land of script and thumb print. According to UNESCO (2015) nearly 26 million citizens are still functionally illiterate.

*b) Statement of the Problem*

There is positive relationship and zero impact relationship in view of previous studies as Croppenstedt and Muller (1998) resulted by using data from Ethiopia Rural Household Survey (ERHS) to check effects of numerous forms of human capital upon agricultural productivity, but find that there is no relationship between their measure of education and agricultural output. According to their finding, literate farmers were found to be relatively and undeniably more efficient than those without literacy. The production function approach has produced evidence of a link between education and agricultural output in the developing world literature. It is also proved by some previous studies that education have impact on the technology as well.

Functional literacy can be a substitute for or a complement to farm experience in farm output. There are also different researches on associated issues of rural development and functional adult literacy from different perspective. For example; linking functional adult literacy (FAL) within poverty reduction interventions: potentials and prospects in Ethiopia By Samuel AsnakeWollie (2012), the capacity of adult literacy facilitators to effectively impart knowledge and skills that enabled the learners to be functional in society by Audi Oluoch, Ayodo TMO and SimatwaEnose (2014), impact of educated farmer on Agricultural Product by EzatollahAbbasian and Tanveer Hussain (2011) in the District Mails, and the effects of education on farmer productivity in rural Ethiopia by Sharada Weir (1999), Mirotchie (1994) investigates technical efficiency in cereal crop production in Ethiopia using aggregate data for the period 1980-86, Croppenstedt and Muller (1998) examine the effects of various forms of human capital upon agricultural productivity using data from the first round of the Ethiopia Rural Household Survey (ERHS),and Dercon and Krishnan (1998), using panel data on six sites covered by both the ERHS and a 1989 IFPRI survey, found that the decline in poverty between 1989 and 1994 was greater for household heads who had completed primary schooling than for those who had less (or no) education. All the above mentioned researches', which were quantitatively done, finding stated that as there is a positive correlation between education and farmers' productivity and production. However, there is limitation of direct evidence to explain qualitatively about the impact of the functional adult literacy of education upon farmer production in rural Ethiopia, particularly in south western parts of the country. So the aim of a term paper is to fulfill this gap.

*c) Objectives of the Study*

i. *General objective*

The objective of the paper is to identify the impacts of functional adult literacy education on farmer's production.

ii. *Specific Objectives*

- To identify the how functional adult literacy has impacts on farmers' production
- To ascertain the complementary benefits of functional adult literacy in farmers' production
- To find out the associated problems with functional adult literacy in farmers' production

*d) Significance of the Study*

The research paper will have both academic and applied expected outcomes for different beneficiaries. It may has significance for the readers by providing with some basic and qualitative information. It also helps responsible bodies on the area of education, health, and agriculture to get information as an input for the economic growth and development of an individual and a country from socio-cultural, political, and economic perspective.

*e) Limitation of the Study*

This paper as a usual has its own limitations. Since I used only qualitative method of primary data collection, the quantitative data were ignored. So the study may not provide a full information on functional adult literacy in relation to farmers' production. The other limitation of a paper is related with sample size. Because of the nature of objectives of the study and only purposively selected and interviewed six individuals, the collected data couldn't be generalized to the population. These all limitations of the study is directly or indirectly accused of time and budget constraints.

*f) Scope of the Study*

This study is limited to collecting a qualitative data regarding the impacts of functional adult literacy on farmers' production in kerse woreda, south western Ethiopia because of time and budget constraints. The ways in which functional adult literacy increases or decreases farmers' production, and associated benefits and problems with production and functional adult literacy were dialectically included.

### g) *Research Methods*

#### i. *Research Design*

A cross-sectional study design was employed. The information/data were collected at a time using this design. The researcher selected this study design in that it helps to minimize financial expenditure, to save time, to make respondents not bored with repeated interview and to study a number of individuals who have the same characteristics of interests at a single time.

#### ii. *Study Area and Study Population*

The study was conducted at Kersa Woreda of Jimma Zone, Oromia Regional State. The Woreda is located at about 331 km away from Addis Ababa and 22 km from Jimma town to the South West. The area shares boundaries with Mannah in the West, Omo Neda Woreda in the East, Dedo woreda in the South, Limmu Kossa in the North and Tiro Afeta in North East. The total area of the Woreda is estimated at 40788 hectares. This total land is allocated to arable land(71%) , grazing land(11%) , forest land (10%) , bushes and shrubs (2%), construction (1%) and others (5%) which are yet to be classified according the data obtained from Woreda Agricultural Office,2010. The unclassified land is assumed to be covered by woodland and others. Kersa Woreda is generally located among the low land areas of the country where the rainfall varies from 1000mm-1800mm, and the annual mean temperature varies from 10.60 to 26.90 Celsius. Within the Woreda, there are two agro ecology(middle and low land). Additionally the climatic condition of the study area consists dega (10%) and woina dega (90%). The study area is known for its natural vegetation cover before some 10-20 years ago, where remainder of natural vegetation of a country is expected to be existed. But currently the area is under severe pressure of deforestation and land degradation, because of population increase and their violation in forestlands which are converted into farm lands especially in untouched low land areas of the Woreda. The main source of income of the woreda include agriculture (animal husbandry and crop production), trade, some from remittances (From woreda agricultural office). There are about 172167 number of population and 26865 number of households in Kersa woreda.

#### iii. *Sources of Data*

The data required for the study includes both primary and secondary sources of data. The contributions of both sources were effective to accomplish this study. The primary data were obtained from the respondents through the use of observation and in-depth interview and the secondary one was obtained from the data collected for other purposes and other materials in the form of archival research.

#### iv. *Methods and Tools of Data Collection*

Only qualitative approach of data collection was used for primary data. While depth interview was used as a method, interview guidelines was used as a tool of data collection. Archival method was used to collect a secondary data such as articles, books, Medias, and reports.

#### v. *Sampling Size and Sampling Technique*

Few individuals were purposively selected and sample size was determined by saturation point. To fulfill the identified gap and give a response for the listed objectives scientifically; one education expert, one agricultural extension and three farmers were included. Among three of farmers, one is female farmer. The reasons; for the selection of this sampling technique and being limited to this sample size; are directly or indirectly related with the nature of the topic, interest of the researcher, setting, lack of sample frame, and budget.

#### vi. *Method of Data Analysis*

Qualitative information was analyzed using thematic analysis. In other words, data collected through in-depth interview, and observation were transcribed, organized and classified (re-classified) into thematic topics and then analyzed to generate meanings and implications.

#### vii. *Ethical Consideration*

In conducting this study, the following ethical considerations and safety measures were made; administrative ethical procedures were followed; informed consent: after the purposes and importance of the study were explained for the participants of the study, informed consent was obtained from each of them; and privacy and confidentiality: the privacy of the participants were promoted and they were be informed that whatever information they provide will be kept confidential.

# Chapter Two

## II. Results and Discussion

### a) *Results*

This chapter explains about the means FAL increases the farmers production, related benefits and problems as the data collected form the respondents organized in thematic, described and interpreted.

#### i. *The Means of Functional Adult Literacy to Increases Farmers' Production*

##### a. *Collaboration among education, health, and agricultural sectors*

According to the data collected from the respondents, functional adult literacy can increases farmers' production in numerous approaches. The collaboration between the three bodies (education bureau, health bureau, and agricultural bureau) has a great role in mounting functional adult literacy among farmers. They were identifying, analyzing and solving the problems of farmers by expanding functional adult literacy together. By going to these centers they are mobilizing a community. Education and agricultural extension workers argue that providing this education is significantly increasing a farmer's production which has a positive inference on the individual and economic growth of a country. Regarding this an interviewed education expert states that;

*Our farmers are learning. We are also mobilizing in various means such as Medias, session, postures, pamphlets, students, and so on together. We are working with them. They are addressing their problems with solutions openly. Really, their production is different from that of before this education. Today agricultural extension workers are also teaching on a black board by drawing a picture, writing a names of their products, writing farmer's questions and answers regarding with their products, and time schedule for farming according to their interests. Teachers, from education sector, are also teaching accordingly. Our woreda is at the best position of this year by its best strategies of cooperating with all responsible bodies. We were interviewing a farmers that they are happy with this program and arguing that the program is increasing their production and productivity. So I think that our being cooperation is an initiative factors for the participation of farmers on functional adult literacy which eventually increases the farmers' production.*

Agriculture extensions were working with a farmers for a long period of time however, there is no significant change in farmer's production and productivity in a woreda before working in a collaboration with education expert and health extension workers. On the trends, and strategies of functional adult literacy before and/or after cooperation with other responsible bodies, an interviewed agricultural extension explained that;

*We were working with a farmers for a long period of time. We couldn't achieve a significant change, especially because of lack of human capacity of accepting and using information and new technologies. Uneducated Farmers see themselves as a victims of a system and all new things as a way of manipulating their resources. They didn't admit us. We were conflicting with them for a long period of time. Even, they didn't want to see at us. They closed a door at us. They said to us that we know the way of life ourselves and so we do not need any help from you. You are coming here to spread other problems such as diseases. But after we have started to work with education expert and health extension there is a great change on a farmer's attitude and production. They have admitted that, they had been creating problems in their life and their country because of lack of education. Now they are inspiring than us to learn. Even if we absent from the class they raise as a complaint. There is a great change. Generally for me, working cooperatively is the best means of changing our community to achieve a stated goals at different levels..*

Interviewed farmers also argue that they are too happy with the provision of education cooperatively by education expert, health, and agricultural extensions. They added that a large number of people have started to participate on functional education after three sectors had worked together. Generally, for them giving functional adult literacy cooperatively can increase their production.

b. *Motivation by benefits and setting*

As a result of functional adult literacy program, the farmers are producing their products for various purpose differently. This differentiation has anoptimisticrepercussion for the health of household members. So, the advantages they are getting can be considered as a means for an increment of farmers' participation to learn, eventually to change their life through changing the process of participating in economic activities conferring to the responses of the respondents. Here also an interviewed education expert added that;

*They are producing a products which have an indispensable advantages for their health in separate from cash crops. These all are the results of their education. We can say that the boosting willingness and advantages they are getting from this education is a way of motivating a laggard farmers. Generally; we are appealing a farmers to functional adult literacy by a fruitful work and benefits rather than word.*

Farmers raise also as the way of providing an education for them is attractive and feasible. They are also too happy with the program. They argue that opening an education center in our neighbor is a benefit which initiates them to learn what they hadn't before this time. On this regard one interviewed farmer argue that;

*Thanks to our government and God that we are learning in our home. We are too impressed of learning at this age (49 years old) which is unthinkable. Teachers are good; that means they can understand our interests and teaching us accordingly. Since the backbone of our life is based on agriculture, our teachers are teaching us by cooperating with health extension and agricultural extension. They are teaching us on a black board about selected seeds, fertilizers, pesticides, and new technologies. So, by using all these what we have gotten from our teachers we are producing in a large volume than before and getting other benefits. These benefits initiates others to participate in functional adult literacy.*

c. *Increased number of participants*

The other tactic on which functional adult literacy increases a farmers' production is an increment of all household members' participation on functional adult literacy which results in high productivity and production. The females' participation is increasing on outside work highly which highly mobilized others to participate to escape from not to be secluded. For example, female farmer I interviewed argue that;

*Before the coming of this functional adult literacy we were not allowed to work outside home. Our roles were only giving birth, waiting a hand of our husband, cooking a food for a family, washing clothes and so on. We have no a security to our property. Different problems were happened if a male family head die. But today, after government helped us to work with each other at all setting we are living a best life of respect and secure. A large number of females have started to learn and we also started by keen-sighted them. Thus, the increment of a number of people in our Kebele on functional adult education motivates us to learn. As a result, our production was increased. Generally, this program increases a household members' participation on agricultural activities and eventually results in high farmers' production.*

d. *One to five productive army*

The cooperation of a farmers in a form of one to five is raised by government as a mode through which functional adult literacy increases a farmers' production according to the retorts of education expert. By being in one to five; they are discussing all their social problems, exchanging information, understanding a world and increasing their production. Functional adult literacy is also being provided in this form which has a constructive allegation on farmers' production. Regarding this one interviewed farmer explained as the follows;

*We have been grouped to one to five farmers' productive army. We are learning by this group. We are exchanging information regarding to agricultural production and others through this group. We are doing a given assignment by this group. On farms also we are working by this group. Our agricultural production are really changed. For example, if one of us has a problem on using an information, technologies, and being provided education; we help each other as much as possible.*

ii. *Supplementary Leads of Functional Adult Literacy in Farmers' Production*

a. *Economic growth*

The interviewed education expert and agricultural extension described various advantages of functional adult literacy from different perspectives in relation to farmers' production. An interviewed education expert argue that;

*Functional adult literacy has many benefits in relation to farmers' production. The increment of farmers' production results in economic growth of a country what we are observing practically. As the production increases, different services which show economic growth and development have been happened. Farmers are using new technologies such as mobile phone, and others and increasing their production.*

b. *Development of social services*

In relation to the increment of farmers' production, different services particularly road, schools and health extension are boosting. An interviewed agricultural extension elaborated this as;

*After functional adult literacy was given for the farmers; their production; interest for different services such as health and education, and industry products increased. They started to request for the construction of road to bring their increased products to the market, the construction of health centers to decrease maternal mortality rate, and opening school in their neighborhood for adults by encompassing cultural, economic, and social factors are all the results of functional adult literacy in our woreda.*

c. *Human and physical capital development*

Farmers could also explain the benefits of functional adult literacy from social, cultural, and political dimensions from external world. Some of the advantages respondents have mentioned are; understanding about the world, solving family's conflict, controlling the behavior of their children, keeping environment, equality, increasing life security, using modern material, having standard house, using pure water, keeping our health, keeping our environment, increasing efficiency and effectiveness, peacefully living and working with our neighbor and community, peacefully working with our government, and using time tentatively. These advantages have an encouraging impact on their production and related with human and physical capital directly and/or indirectly. Parents that have faced the hardships of not being able to write letters, use mobile phones or ATMs do all they can to provide their children with an education so they don't ever become excluded due to illiteracy. One interviewed farmer explained the advantages he is getting from functional adult literacy in relation to human capital as follows;

*After I started this education I could get a lot of benefits. I could use ATM and mobile easily to communicate with all my relatives at a distance and with others about my products. My production was increased. All my family are living a good life. My children are learning without any problem. My wife and all family members are working together and peacefully. The conflict between families is decreased. Thus, we are a healthy family living in a healthy environment.*

Other respondent also described the benefits getting from functional adult literacy as the follows;

*From this education we are getting a lot of things. For example we are learning how we keep our environment, and understand the world. Now we can read about the world economic markets, world problems, to keep our healthy, to prevent disease, to keep our environment and etc. Then if our health is good, and our environment is clean we can produce a large volume of agricultural production.*

*d. Development of social capital*

Respecting each other, equality, and trust among families and neighborhoods is another advantages that they are getting from functional adult literacy. One of my respondents described her benefits in association to agricultural products as follows;

*Being equal with men and equal usage of our products are, among the others, the results of functional adult literacy. Before two decades we (females) have no property security, we do not now about the information out of home and so on. But now thanks to my government, I am participating in all economic activities with all the household members equally, effectively, efficiently, and productively. We have a good social networks now before the coming of this program. I swear to you, now we are living a good life and determining for ourselves (females) that is based on trust and love.*

ii. *Allied Complications with Functional Adult Literacy*

Even though it has a great role in the increment of farmers' production, functional adult literacy has problems such as political, cultural, environmental, demographic contexts. Education expert interviewed raised the problems associated with functional adult literacy, which impact on farmers' production, as follows:

*Functional adult literacy has a lot of advantages, but a lot of people are not accepting all what are being provided as expected. There are some individuals who refuse to learn by arguing that teaching my children is enough so what I will get from it is not as such significant. The others argue that after this year's old age, learning has no advantages for me rather than burning my time. Some females also refuses to learn by associating with religious dogmas as mixing with male is forbidden. Absenteeism is also another problems because of different climate change.... That means during harvesting or ploughing there is no continuous education which eventually disturbed the schedule of the program as planned. The other problem is that sometimes this program is creating a conflict between families as it can solve a conflict. The angels from which a family use and take the program matter. For example we know a case in which husband and wife conflicted with each other. Wife wants to learn since she has a good intensions with a modern world education. But her husband refused to allow her to learn. All her neighbor females were learning. Repeatedly she had told the case to the community elders. But they couldn't finish the case. Gradually our teachers intervened and finished the cases and now both husband and wife are learning. Besides, they told us that now they are beneficial and they are mobilizing others individuals like them to learn.*

There is also a case in which rural farmers associated functional adult literacy with politics. Because of that they don't admit externals. Most of the time they see from a negative perspectives. For example they doubt that these individuals (health extension, agricultural extension) came to us either to manipulate our resources or to use us as a means of fulfilling their hidden political goals or to abolish our culture of farming or to create a conflict between our families and so on. An interviewed agricultural extension explained that'

*At early stage the farmers were full of doubt. This even results in absenteeism from work by closing their door in the home. Even though it was not measured this has a negative impacts on farmers' production. They were hiding their property because of doubt while we want there to teach them. However, now there is a great change in attitude and usage of the programs among the participants.*

Providing education regardless of a context is another problems raised by interviewed farmers. One of interviewed farmer stated that;

*They are not teaching us according to the context of our culture, social relation, production and so on. If they can teach according to our culture, time of work, type of products in our woreda it will be fruitful. However for me there is a gap of contextualization.*

The other farmer also stated that;

*The material is not being given for us. There is a limitation of books, and others which tell about our woreda accordingly. So by correcting this problem if we can work continuously on the program it has a great contribution for an individual and society development.*

*b) Discussion*

This paper deals with the methods used to increase functional adult literacy which has a positive implication on the farmers' production. The increment of production has an advantages of increasing economic development. Through functional adult literacy, a family member's exchange information with each other which can provides a bases for economic growth and development. There are a large number of findings which argue that functional adult literacy has a source of information in poverty alleviation and conveying economic and social development. For example Abadzi (2003) states that adult literacy is highly relevant to poverty alleviation efforts worldwide, because in the 21st century much of the information needed to make decisions and improve one's economic, personal, family, or political conditions is presented in written form. Study conducted in Malawi also demonstrates that high literacy levels correlate positively with low poverty levels (Herbert 2004). Further, Kishindo (1994) claim that a high level of illiteracy hinders information exchange and the transfer of skills.

Illiterate farmers, for example, have limited access to information that could help them to increase their agricultural output through the adoption of modern agricultural techniques, since the dissemination of these techniques is mostly through the print media. For the majority of rural households who depend on agriculture for their subsistence and cash incomes, the inability to read, in a situation where extension services are either inadequate or non-existent, means continued use of unproductive production methods; and the resulting poor yields easily translate into poverty and undernourishment.

Functional adult literacy can also changes the farmers' production by creating a self-image; developing writing, calculating, and reading skills; developing willingness to continue education; and involving in their children's education. In the same manner Beder (1999) argue that adult literacy education has a positive influence on participants 'continued education. Learners perceive that participation in adult literacy education improves their skills in reading, writing. Participation in adult literacy has a positive impact on learners' self-image. According to learners' self-reports, participation in adult literacy education has a positive impact on parents' involvement in their children's education.

Functional adult literacy develops human and social capital. The development of human and social capital has a constructive implication on the development of farmers' production at short and gradually and at long term it has a gains of economic growth and development. If there is high participation in their society, an individuals can identify their problems and forward a best solution. Similarly, DFID (2015) report states that in terms of social and political development, literacy education has been shown to enhance confidence, contribute to personal development, promote improved family hygiene, nutrition, health, and social and political participation. Correspondingly, Wallace's (2007) core argument is that rural education and training (RET) is the key to more knowledgeable and productive human capital, which is essential for increased productivity, diversification and sustainability of small-scale households in rural sub-Saharan Africa. There are two important ways in which education may increase farm output: (1) general skills acquired in school reduce technical and allocative inefficiencies in production; and (2) attitudes acquired in school encourage the adoption of new technologies which cause the production frontier to shift outward (Hussain and Byerlee 1995).

### *c) Policy Implication and Recommendations*

Promotion of literacy education is regarded as a concern of all key development agencies, government as well as Non-Governmental Organizations. The importance of adult literacy in national development is also recognized in the country's major development policies and frameworks like PASDEP, GTPI, GTPII, ADLI highly under the strategy of human capital. The Functional Adult Literacy Policy should practically linked to almost every other government policy since literacy enables people to function properly within their societies. People can effectively engage in the market place or in the public whenever dealing with contract and title deeds, politics, and basic health services, including HIV and AIDS as long as they are able to read and write and comprehend. Literacy thus liberates and empowers people to make generally meaningful and informed decisions, choices and actions as it increases the opportunity for individuals and communities to reflect on their situation. Gradually, it increases farmers' production through which an individuals' and a country's economic, social, and political development can be achieved.

In promoting greater awareness of understanding of adult literacy issues particularly in the context of the overall scheme of national development priorities and concerns, and giving emphasis for the farmers' production; a related policy should encompasses the following points in the form of recommendation.

- Ensuring that strategies on adult literacy are put in place and are responsive to the Socio-economic needs of communities.
- Promoting strategic linkages and coordination among literacy providers and related services from both public and the non-state sector.
- Ensuringwell-funded comprehensive and broadly accessible services at all levels of literacy with multiple points of entry and mechanisms for smooth transitions between components.
- Promoting the adoption of accepted and recognized standards of programme quality for adult literacy interventions.

### *d) Conclusion*

Education can enhance farm production and productivity directly by improving the quality of human capital, social capital, and physical capital. Education is thought to be most important to farm production in a rapidly changing technological or economic environment by exchanging information accordingly through different means. Identifying the means, benefits and problems associated with functional adult literacy in improving the farmers' production are the objectives of the study. To fulfill these objectives a data were collected for by interview from an individuals who were purposively selected.

As a result, collaboration between education, health, and agricultural sectors, creating motivation by increasing benefits and modifying setting, increasing the number of stakeholders, and utilizing one to five farmers' productive army are the methods a responsible bodies are using to increase a farmers' production. However there are a problems associated with the programs such as contextualizing of a program to the politics, culture, social, and economics of our country. Besides, lack of material is also another problem. To solve this problem a government should develops a feasible policy of functional adult literacy and attach with all other policies of a country since education is the base for all.

## III. Acknowledgments

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*Acronyms*

ADLI Agricultural Development Led Industrialization

ERHS Ethiopia Rural Household Survey

FAL Functional Adult Literacy

GTPI Growth and Transformation Plan

PASDEP Plan for Accelerated and Sustained Development to End Poverty

RET Rural Education and Training

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# Understanding Blackness in South Korea: Experiences of one Black Teacher and One Black Student

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*Abstract -* This study examines the experiences of one Black individual (Wilkine Brutus) who worked as a teacher and one Black individual (Sam Okyere) who was a university student in South Korea. The purpose of this study was to understand the meaning of Blackness in South Korea and how it is constructed, how anti-Black sentiments affect Black individuals, and how Black individuals - given the opportunity in South Korea in diverse fields - may shape and transform the construct of Blackness in the country. This study raises a number of issues in the Korean context where Black individuals are being discriminated against because of their race and skin color, and are denied opportunities, especially in the field of education.

*Keywords: blackness, race, discrimination, south korea,education, multicultural, black teacher, black student.*

*GJHSS-C Classification: FOR Code: 950202*

UNDERSTANDINGBLACKNESSINSOUTHKOREAEXPERIENCESOFONEBLACKTEACHERANDONEBLACKSTUDENT

*Strictly as per the compliance and regulations of:*

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## I. Introduction

There has been an increasing presence of Blacks in the South Korean mainstream media and music industry in recent years. In the summer of 2016, South Korea (hereafter, Korea) held "Asia's largest Black music festival," titled "Seoul Soul Festival" featuring "Soul" artists such as Eric Benet and MAXWELL (Song, 2016). The same year, Joseph Butso, a Black American exchange student from Ohio, became the winner on a Korean television singing competition show called "I Can See Your Voice" (Yuen, 2016). Despite the growing media representation of Blacks in Korea, discriminatory treatment against Blacks and anti-Black racism continue to be apparent in various industries. Discrimination and inequality against Blacks are not only subtle and systemic, but blatant. Relatively few studies have specifically examined discrimination against Black people and the meaning of Blackness in Korea.

One of the fields that presents Blackness, or the absence of Blackness in Korea, is in the field of education. Very little discussion has focused on what it means to be Black, specifically in the Korean educational context. In a country that is heavily committed to education as Korea, unequal treatment towards Black educators and students are evident. Students who are Black are not only being denied entry to academic programs, but teachers and instructors have been excluded from teaching opportunities due to their skin color. Because most Korean recruiters require photos on resumes, most Black teachers are not even given a chance before going to Korea (Hazzan, 2014). To this end, It is important to examine what Blackness means in the Korean culture, as well as the deeply embedded racism and colorism related to it. Why is there still only a small Black population in Korea despite the increasing multicultural population? How is Blackness constructed in Korean culture? It is also important to understand how anti-Black sentiments specifically affect Black educators and students in the country. What are some of the experiences Black educators and students have in education in Korea? How do Black educators and students contribute to the dialogue of racial identity and multiculturalism in Korea? The current study addresses these questions.

## II. Framing Ideas and in Forming Literature

Three framing ideas derived from the literature provides a basis for understanding the multifaceted construct of Blackness in Korea as well as better understand the experiences of Black educators and students in the country.

### *a) Critical Race Theory (CRT)*

Critical Race Theory (CRT) is a framework that developed primarily to challenge the existing social injustice and racial oppression in the United States. According to Delgado and Stefancic (2001), there are three major premises to Critical Race Theory. The first is the proposition that "racism is normal, not aberrant, in American society. Because racism is an ingrained feature of our landscape, it looks ordinary and natural to persons in the culture" (Delgado & Stefancic, 2001, p.xvi). Race as a social construct and racism in Korea can be better understood through the framework and main themes of CRT. Racism in Korea is "normal" and "ordinary." In fact, at the core of Korea's "ordinary" racism, we find Korean supremacy, which is much like the concept of White supremacy of CRT. CRT interprets Whiteness as the default racial identity in the US, we may see that 'Korean(race)-ness' is the default racial identity in Korea. Koreans view themselves as a racial entity as much an ethnic entity. The racial hierarchy created in Korea puts *Koreanness* as dominant, and other national and cultural groups as secondary.

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The second premise of Critical Race Theory is based on Bell's (1980) concept of interest convergence. Bell (1980) argued that advances in racial equality, including political ones, come about when the self-interests of the White elites are promoted. In other words, different minority groups are racialized differently by the dominant society in response to shifting needs such as the labor market. Popular images and stereotypes of minorities may shift according to the needs and conditions of the majority group at the time. In the Korean context, we may see how the society responds to the different needs of the Korean elites and how minority groups are racialized differently. For example, before the mid-1990s, Chinese or Japanese immigrants in Korea were discriminated against for their non-Korean racial background, physical appearance, and language. However, with the plummeting birthrate and increasing cost of labor, Korea experienced a large influx of foreign immigrants from Southeast Asia during the mid-1990s. Since then, the images and stereotypes of foreigners from China or Japan shifted to be more favorable than those of Southeast Asian descent, because they had lighter skin and were closer to being 'Korean.'

The third premise of Critical Race Theory presented by Delgado (1995) is the use of storytelling and counter storytelling as a methodological tool that allows the experiences of the margins of the society to be told. The purpose of storytelling is to "analyze the myths, presuppositions, and received wisdoms that make up the common culture about race," and the counter stories challenge the dominant discourse that "constructs social reality in ways that promote its own self-interest (of that of elite groups)" (Delgado, 1995, p. xiv). In the Korean context, the voice of the Korean male elite is dominant due to the historical and cultural background. However, increasing outlets have reflected the voices of the non-dominant groups of Koreans, including the political sphere. For example, Jasmine Lee, a Filipino immigrant to Korea, was made congresswoman in 2012 of Saenuri party, one of the major political parties in the country. Despite the criticism Jasmine Lee received, she has been one of the important actors at the forefront of cultural and social transformation, providing outlets for non-mainstream Koreans' voices to be heard (D. H. Kim, 2015).

*b) Literature on Blackness*

There have been prior studies regarding how Blackness is constructed in the global context. Sterling (2011) argues there are four main trends in literature on Blackness around the world that gives insight into how Blackness is constructed around the world: a) scholarship on global and transnational Blackness that developed from scholarship on the African diaspora and the Black Atlantic; b) scholarship on the claiming or reassertion of African-descended identities; c) literature on Blackness in East Asia; and d) literature on 'the Afro-Asian' which explores the interchanges between both the African and Asian diasporas. In his study, Sterling shows how the discourses of global Blackness share circumstances of their production, while containing locally particular cases. Specifically, Sterling examines how Blackness was constituted in Japan—a space in which few Black people have historically lived—and how Jamaican culture in Japan encaptures the many discourses of global Blackness.

Theorizing Blackness as an identity in Korea is complex due to the history of the Black population in the country which is deeply intertwined with the political and economic spheres. Although Korea had cultural exchanges with foreign countries prior to the 20th century, migration of people to and from Korea was limited. The first wave of non-Korean residents in Korea occurred during and after the Korean War (1950-1953). At the time of the Korean War, there were more than 36,000 American soldiers that were sent to Korea to aid the country (CNN, 2016). Many American soldiers continued to reside after the Korean War ended as well at the U.S. military bases in the country. Due to this reason, one of the predominant stereotypes of Black people in Korea is "American soldier." Since then, despite the fact that there has been a substantial number of biracial Black-Koreans in the country, it was only until the mid-2000s that Korea started addressing the racially diverse population in the country. Even though awareness of a "multicultural" population has grown, the images and stereotypes of Blacks are still limited, which also affects how the construct of Blackness is constructed in the country.

There are various aspects that constitute Blackness in Korea. One aspect of Blackness in Korea centers around a neoliberalist, consumerism-based core. According to Sterling (2011), the representations of Black people are essential zed to make Blackness "sensorially accessible to the consumer" and to be used in "heightened consumer-driven reflexivity" (p.167). In this sense, the growing popularity of hip hop, rap, reggae, blues, and jazz—dubbed "Black music" in Korea—may be understood. Despite the fact that the music genres historically stem from different times and places, they become accessible for Koreans to consume. Another aspect of Blackness in Korea stems from national and international media, as represented in television stations, news outlets, fashion magazines, and other such sources. In Korea, the media plays a powerful role in shaping the public opinion and images, especially after the dictatorial withdrawal in the late 1980s. Before the 1980s, the images and representations of Black people in Korea were limited to slaves, poor people, or tribal Africans. From the 1980s, media images began to include American media and Hollywood influences that focused on Black criminality, violence, and drug use (N. Kim, as cited in Hazzan, 2014).

c) *Education in Korea*

It is crucial to examine the educational sphere because Koreans put a lot of emphasize on education, so much so that their fervor and passion for learning has been labeled the "education syndrome" (Kim-Renaud, Grinker, & Larsen, 2005). Some scholars refer to this passion for learning as "*kyoyukyul* (education fever)" or "preoccupation with education" (Seth, 2002). With globalization and and international migration, the demand for English education in the nation grew rapidly as well. By 2006, Korea ranked first in the world in regard to the estimated consumer expenditure on private education of English language, reaching 10 trillion won (approximately US $8.6 billion) (Ma, 2007). It was also reported that every year the amount that Korean parents spend on their children's English education increases drastically (Chang, 2008).

At the core of English education in Korea lies ideologies of race, language, and capitalism that create a hierarchical system. This is true with hiring practices of English educators in Korea, where White English teachers are preferred over native English speaking teachers of color. In fact, employers in Korea are often "casually, and openly, prejudiced", to the point where recruitment advertisements require applicants to submit their photos and state "Need: White" on the list of required qualifications (Barnes, 2014). In both public and private education institutions in Korea, the opportunities Black educators have is limited due to their skin color. Even though Black educators may be far more qualified than their non-Black counterparts, Koreans would look down on them asking questions like, "How did you go to school and become a professor when you are Black?" and also refuse to accept them because they had a "No Blacks" stance (Kang, 2008).

Hand in hand with discrimination against Black people in the English education industry is also discrimination against Black students from foreign countries who plan to study in Korea. Students from African countries in particular have experienced gate keeping from Korean education institutions for the color of their skin. On one interview Ghanaian actor Abu Dad shared his journey of trying to apply for medical school in Korea only to be rejected for being Black (Donga Digital News Team, 2014). In a separate interview, Kenyan international student Stanley Hawi, who studies computer science at one of Korea's top universities, said that he would receive comments such as, "Go back to your country. Why is your skin Black but your teeth so white?" along with mean glances (M. Kim, 2013).

## III. Methodology

Qualitative case studies are utilized when exploring a single person, a program, a group, an institution, a community, or a specific policy, as the unit of analysis (Merriam, 2009). According to Merriam (2009), a qualitative case study is "an in-depth study of a bounded system in which meaning and understanding of the phenomenon of interest are sought" (p. 457). Qualitative case study design is used when the researcher to closely examine the contextual conditions relevant to the phenomenon under study as a preliminary step in guiding future research. Yin (2003) explains that a qualitative case study design should be considered when: (a) the focus of the study is to answer "how" and "why" questions; (b) you cannot manipulate the behavior of those involved in the study; (c) you want to cover contextual conditions because you believe they are relevant to the phenomenon under study; or (d) the boundaries are not clear between the phenomenon and context.

Case studies are of a single bounded unit, so "documents" are invaluable sources of information and insight about the case (Merriam, 2009). Not much information was available regarding Blackness in the South Korean education context because of the small number Black educators and Black student in Korea as a whole. Hence purposive sampling was used for the selection of the cases because they yielded information that could best address the study's purpose; in this instance, to understand the experiences of Black teachers and Black students in the South Korea. Both individuals of this study had gone to Korea initially for educational purposes - whether to learn or to teach - and both had made an impact in the Korean society and beyond. The written, oral, visual, public records, personal documents and other types of documents (such as TV interviews and vlogs) of both cases were an invaluable source of information the for this study.

The data for this study was collected using two major sources. First, I used document analysis of news articles, public documents, Korean government studies and reviews, web pages, papers available online, and excerpts and clips from Korean media outlets including television, radio, and podcasts. I specifically looked into Black students and teachers in the Korean education field that were being noticed to Korean nationals and foreigners in the country. Second, I used blogs, vlogs (video blogs), and articles of a Haitian American writer, host, and producer, Wilkine Brutus, who documented his experiences as a Black individual living in Korea and as a former educator who taught English in Korea as well. I also used video clips, TV shows and articles about Sam Okyere.

In order to analyze my data, I used open coding method. Saldaña (2009) says that coding is cyclical, and that each cycle of coding "further manages, filters, highlights, and focuses the salient features of the qualitative data record for generating categories, themes, and concepts, grasping meaning and/or building theory" (p. 8). Open coding encourages

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analysts to take a thematic approach to breaking down the texts into pieces, examining, comparing, conceptualizing, categorizing data to grasp meaning or build theory. (Boeije, 2010; Strauss & Corbin, 2007). The data that was collected in this study was read very carefully and divided into fragments. At the first level of coding, I read through my data several times and looked for distinct concepts and categories in the data, which formed the basic units of my analysis. As I read through the interview transcripts and articles, I broke down the data into first-level concepts and second-level and third-level categories. One of the main sources of codes were the concepts derived from the framing literature and theories (Boeije, 2010). The first-level codes that I used were derived from literature, my conceptual framework, and the research questions. The subset of categories within each code were derived from the interviews and articles. After going through all the data in four cycles, I then transferred the final concepts and categories into a list of codes ('coding scheme') on a data table.

## IV. The Construction of Blackness in Korea

My data showed that there were three main sources that constructed Blackness and anti-Blackness in Korea which were not mutually exclusive and often overlapped and interacted with each other simultaneously. The first source that constructed Blackness in Korea was ignorance. Merriam-Webster (2017) defines ignorance as "destitute of knowledge or education...lacking knowledge or comprehension of the thing specified." In this sense, the two Black male individuals in my study both encountered Koreans who were ignorant, or lacked cultural knowledge about Black people. While it may not be possible to distinguish ignorance from racism, part of Blackness that is formed in Korea is locally-specific and historically-bound. Much like Japan, historically, there have not been many Black people living in Korea. Hence some Koreans may not have had much opportunity or experience being exposed to cross-racial or cross-cultural encounters.

Wilkine Brutus went to Korea as a teacher for a Korean Government Service-Learning scholarship called TaLK (Teach and Learn in Korea). This program was created in September, 2008 by the Korean government in order to decrease the English education gap between major metropolitan cities and agricultural, mountain and fishing villages. While working as an English teacher for the TaLK program in an elementary school in the island of Jeju an island that is remote from major metropolitan Korean cities, Brutus encountered Koreans who had never personally met a Black person before. In one of the festivals he went to, Brutus explained that he and his friends stood out as "the Jeju locals gave us an undeserving celebrity treatment, pulling out multiple Samsung and LG cameras and cheesing from east to west" while others stood "afar, afraid, and indecisive" (Brutus, 2016). In the video of the festival, many older Korean women come up to Brutus to touch his dreadlocks commenting, 'It is real hair.' One of the older Korean women went under his arm with his dreadlocks covering her head and took photographs with him (Brutus, 2010). Brutus described how the woman:

> The old Korean lady gave a welcoming gesture, as she took a hesitant step toward me. Before I knew it, she immediately stroked my long dreadlocks, dived underneath my right arm, conjoined her Asian V-for-Victory sign with my peace sign for a close-up snapshot; and after the picture, she jumped up and down like a 5-year-old who had just discovered the meaning of life (Brutus, 2016).

The lack of cultural knowledge may go both ways. Sam Ok yere initially went to Korea in 2009 after he received a scholarship from the Korean government that allowed foreign students to learn computer engineering. He attended a Korean language institute a year before he started his computer engineering program in 2010, which he graduated in 2014. Okyere shared that when he had first applied to the Korean government-sponsored program, he applied as if he were going on a blind date, not knowing anything about the country. Even after he was selected and went to Korea at the age of 18, he was clueless about Korea, other than the fact that the government would sponsor his education (B. Kim, 2016).

The second source that constructs Blackness in Korea is misinformation of Black people that stems from stereotypes and images in popular culture and media. In Korean media, the industries which Blackness is accepted and encouraged is music and sports, much of which promotes the interests of Korean industries and companies rather than racial equality (Bell, 1980). As Lee (2016) argued, images of Africa are limited to stereotypes of developing countries, diseases, starving African children, or safaris. Okyere talked about the questions he received from misinformed Koreans about his country and people from the continent of Africa:

> When I first came to Korea and told people that I'm from Africa, I received a lot of ridiculous questions like, 'Do you grow a lion at your house?' (laughs) I got it so often that from one moment, I naturally responded, 'Yes, my father raised two lions.' It's ridiculous, right? But that's how little Koreans know about Black people and African friends. (JTBC Entertainment, 2017a)

Okyere also shared an experience of when he was taking a taxi to church in Korea. He explained that the Korean taxi driver was hesitant to pick him up at first, but after hearing Okyere speak Korean, he agreed to give him a ride. The taxi driver told Okyere that usually he does would not pick foreigners up because he has the assumption that they all speak English and cannot speak Korean. Okyere expressed that certain of stereotypes of foreigners in Korea like this also affect the way Koreans treat him (Donation for Education, 2015).

The third source that constructs Blackness in Korea is racism and racial preference. Koreans view themselves as a race as much as they do an ethnic group (Sharpe, 2003). Colorism and the preference of lighter skin also contributes to Koreans' construct of Blackness. Oftentimes, racial attitudes of Koreans towards Blacks and darker skinned individuals are expressed in fear, indifference, or anger. One of the photographs Brutus posted on his blog captures a middle-aged Korean woman who is visibly frightened and surprised when she encountered Brutus facing towards her with his dreadlocks in his right hand. Brutus wrote about this experience and explained that the fear may have come from her refusal to understand a Black person:

South Korea, like the United States, is a technologically advanced country, and does a lot of things better than other countries. It isn't always the rural areas that suffer from a lack of cross-group exposure. But the picture...shows a woman who is frightened by what she refuses to understand. (Brutus, 2016)

Similarly, Okyere experienced a racial attitude of a Korean middle-aged woman who expressed it in anger and hate. In one of his interviews, Okyere recalled an encounter he had when he was a university student with a middle-aged Korean woman on the subway when he was about to take a seat on the train:

I was about to sit down in an empty seat [in the subway] and a woman came really fast and sat in the empty seat...She commented, 'What is a black thing' doing here? Go back to your own country.'...Even worse, she asked my Korean friend who was next to me why he was going places with me. In that situation, what hurt me most were the Korean people who were in that spot. They were just watching without doing anything and it hurt me a lot....It really broke my heart. (JTBC Entertainment, 2017a)

Okyere also added that he did not appreciate it when Koreans refer to him as *heuk hyeong*. The Korean word *hyeong* means 'older brother' and is generally used when younger males refer to their older male brothers or older male friends. Okyere explained that some Koreans call him *heuk hyeong* - a slang term which became popular on the internet translating to 'Black bro' - but would prefer to be called Okyere *hyeong*, Okyere *dongsaeng* [younger sibling], or Okyere, which are terms that do not have to do with his skin color (D. Y. Kim, 2014).

## V. Being Black in the Korean Education System

Both Okyere and Brutus expressed how their Blackness, among other social constructs and facets of identities, became salient while living in Korea and how that affected their lives as either a student or teacher. Brutus explained how working as an English teacher in Jeju made him more aware of this race and identity:

It's quite difficult to not look at my experience in Jeju island from a racial lens—it certainly exist: the dreadlocks, the "chocolate" skin, the bigger; double-lid eyes, the facial and body shape, the hyphenated-Americanism—these are new territories to take in and comprehend for the regular day-to-day Korean in Jeju island. (Brutus, 2012)

As a Black international student, Okyere faced difficulties while attending university in Korea. Although he took a year of Korean language classes at the Korean language institute, there were more challenges as a non-Korean student in a predominantly Korean university than just overcoming language barriers. Okyere reflected on his university life in Korea:

The most difficult thing I experienced during my life in Korea is when I was attending university. At the time, my Korean was very limited. If there are assignments, you need to do them with your peers, but at the time I did not have friends so I was so lonely and distressed.

Okyere's experience is consistent with many foreign students in Korea who are accepted in a university program and face challenges in terms of language, making friends, belonging in the larger student community, and facing discrimination in the mainstream society (Kim & Yoon, 2016). According to Kim and Yoon (2016), 26% of foreign university students in Korea reported they were discriminated against, with many experiencing this discrimination outside of school (23.4%) and also at the universities (15.3%). Okyere continued to explain that his experience at the Korean university took a turn when he met a Korean friend at a club he joined at the university:

I tried going to the '*heukin eumak dongari* [Black music club]' on campus. I was the very first and only Black person who ever got into that club. And in the club, I got to know a [Korean] friend...At first, that friend had a bit of resistance towards me because he didn't know how to treat an African so he didn't know what to do. And then he had an opportunity to study abroad in Canada. After he came back, he said, 'Now I know your heart, Okyere. And I will help you more.' So he and I went through the tough school life together and ate meals together all the time. Because of that friend, I was able to get through the difficult university life. (JTBC Entertainment, 2017b)

As Okyere experienced, a sense of belonging and social support - both from other internationals and people from the host country - affects international students' university life including their academic achievement and success (Chavajay, 2013; Glass & Westmont, 2014). Okyere also shared how as a university student, he applied to an English education institution as a part-time teacher, only to be rejected

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because of the color of his skin. Although he passed the phone screening, he was turned down during the face-to-face interview. The explanation that the employer gave him was that they could not imagine what the parents of the students would say if a Black teacher was teaching their kids (JTBC Entertainment, 2017b).

My data showed more than the experiences and challenges of Okyere and Brutus, but how they used their experiences in Korea to continue to impact and influence the Korean society and beyond. As a teacher in Korea, Brutus tried to make an impact as an educator to the Korean students he taught. Brutus wrote that he felt a sense of responsibility as a Black teacher and 'foreigner' teaching younger students because the influence he would have on them. He was setting a foundation for Korean students to construct and reconstruct their views about Black people and foreigners:

My students: their natural disregard for most outer influences (e.g media, hearsay) actually made them seem quite mature. They were mentally open to create their own experience with me and then perhaps compare and contrast at a later stage in their lives. They certainly had formulated opinions about people of color, but in person, nothing was more apparent than the blank slate. I had the historical responsibility to shape or reshape their view about foreigners in general. (Brutus, 2012)

Brutus posted several videos of 'Q & A' sessions with Korean students and their where the Korean students asked questions such as why he decided to become a teacher, what the biggest differences between Korea and America, Korea's influence to the world and the like. The influence Brutus made in the Korean education field was not limited to only his students or the school he taught at, but also to the community as well. He also made a presentation to the Ministry of Education, Science, and Technology and the National Institute for International Education of Korea about co-teaching strategies between foreign teachers and Korean co-teachers, the importance of knowing the Korean language, and his experiences in Korea (Brutus, 2011).

After having received opportunities to learn and pursue his education, Okyere also committed to make change through education and helped build a school in Ghana in 2016 with Korean partners. Through funds collected through a crowdfunding called, 'Orange Act' and with sponsors who donated to the school project, Okyere built the 572 School with World Vision as his partner. Bosuso, where the 572 School was built is an area of East Ghana where the entrance rate of middle school is 25% of elementary school entrance rates and the elementary literacy rate is at 30% (Y. Kim, 2016). In the opening speech of the school, Okyere said:

I had the 'privilege' of receiving an education because of the supporters who supported me. However, education should not a privilege, but a right. Everyone has the right to education. Education is an essential element for human growth and an opportunity to achieve one's dream. I am happy that 1,000 children at the 572 School will enjoy the right to receive an education and to dream. (Y. Kim, 2016)

Okyere also started a campaign "Jollof with Kimchi" selling t-shirts and donated the funds to Ghana orphanages (B. Kim, 2016). Jollof, is a one-pot rice dish popular in West African countries and kimchi is a traditional Korean side dish made with vegetables. "Jollof with Kimchi" came from Okyere's idea that the collaboration and cooperation of two or more 'different' people may bring unimaginable power. Okyere aims to become a cultural ambassador for Ghanians and Koreans, increasing awareness of both countries and cultures to each other.

## VI. Concluding Remarks

There are now over 2 million foreigners in Korea, accounting for 3.9 percent of the nation's population (Ock, 2016). Despite the growth in visible diversity of racial and ethnic groups, there have been many acts of discrimination directed towards foreigners, especially those of darker skin. Korea, despite being "rich, well-educated, peaceful and ethnically homogenous – all trends that appear to coincide with racial tolerance" was reported to be one of the least racially tolerant countries, where "more than one in three South Koreans said they do not want a neighbor of a different race" (Fisher, 2013). Exploring the meaning of Blackness and its effects in Korea uncovers how racism is "normal" and "ordinary" and endemic to the Korean society, embedded in legal, cultural, educational, and social spheres (Delgado & Stefancic, 2001). Black people are only accepted and welcomed in industries that promote the interest of Koreans; otherwise, they are excluded from fields like education due to gate keeping practices of Korean institutions and employers.

This study focused on examining the essential themes from two Black individuals in Korea. Many common themes found in literature on Blackness paralleled the themes that were found in the study. First of all, this study helps understand the experiences of Black individuals in the Korean context. Also, this study engenders useful implications about the South Korean education system, where Black teachers continue to be deprived of opportunities to teach, and Black students are continued to be discriminated. Korean students need to not only have the opportunity to be taught by teachers from various backgrounds, but learn with students from diverse backgrounds as well. Although both individuals in this study initially went to Korea for educational purposes, both individuals did not remain in the South Korean education field after their teaching contract ended or they graduated their university

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program. This leaves room for further research on experiences of Black teachers and students who decide to stay in the education field in South Korea longer term. In addition, while the present study mainly focuses on race as an analytical lens in the field of education, future studies may focus on how intersectionality and different social constructs such as race, gender, sexual orientation, religion, immigration, and the like interact within the South Korean context.

People of all backgrounds contribute to the social and cultural fabric of Korea. Cherry picking who to accept or deny into various industries in Korea based on race, nationality, and skin color will hinder the Korean society to grow and develop. It is crucial that people from all backgrounds, like the Black individuals in this study, are given opportunities in Korea. When more Black individuals are given the opportunity, they will be the agents of change to increase awareness, help debunk stereotypes, and make an influence in Korean communities. The insights gained from this study may expand the current dialogues of global Blackness, especially in East Asian countries. There is little research yet about the diversity within Black people living in East Asian countries, especially Korea. Future studies may explore the diverse experiences of Black people from all walks contribute to the discussion of Blackness in Korea.

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# Instructional Format and Differences in Remedial Mathematics Performance for Community College Students: A Multiyear Investigation

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*Abstract -* Differences in student success rates in remedial mathematics courses as a function of the instructional format (i.e., traditional face-to-face and computer-assisted) were investigated in this study. Data from the 2012-2013 through the 2014-2015 academic years from a single Texas community college were analyzed. For the 3 academic years examined, statistically significant differences were present in remedial mathematics performance by instructional format, with trivial to small effect sizes. Students had higher success rates in remedial mathematics courses in which a traditional lecture format was used than in computer-assisted courses. Implications and recommendations for future research were discussed.

*Keywords: remedial mathematics, instructional format, texas community college, success rates.*

*GJHSS-C Classification: FOR Code: 970101*

INSTRUCTIONALFORMATANDDIFFERENCESINREMEDIALMATHEMATICSPERFORMANCEFORCOMMUNITYCOLLEGESTUDENTSAMULTIYEARINVESTIGATION

*Strictly as per the compliance and regulations of:*

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Edrel Zachery Stoneham [α], George W. Moore [σ], John R. Slate [ρ] & Cynthia Martinez-Garcia [ω]

*Abstract-* Differences in student success rates in remedial mathematics courses as a function of the instructional format (i.e., traditional face-to-face and computer-assisted) were investigated in this study. Data from the 2012-2013 through the 2014-2015 academic years from a single Texas community college were analyzed. For the 3 academic years examined, statistically significant differences were present in remedial mathematics performance by instructional format, with trivial to small effect sizes. Students had higher success rates in remedial mathematics courses in which a traditional lecture format was used than in computer-assisted courses. Implications and recomm-enddations for future research were discussed.

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## I. Introduction

Instructional Format and Differences in Remedial Mathematics Performance for Community College Students: A Multiyear Investigation Students entering community colleges should have the opportunity to succeed and complete a degree or certificate. Students who are not college ready are spending extended time in college remediating subject areas, in which they are not college ready (Scott-Clayton & Rodriguez, 2012). Undergraduate students beginning their academic careers at 4-year institutions are more likely to complete their college degree when compared to undergraduate students who begin their academic careers at a 2-year institution (Brock, 2010). According to the Texas Higher Education Coordinating Board (2008), 16% of community college students in Texas earn college level mathematics credit within twoyears. Policy might be enacted to increase success rates in mathematics remediation programs in Texas community colleges to assist students with completing their college degrees.

The literature reviewed may be categorized into four primary subjects related to the research: (a) technology in remedial mathematics courses, (b) retention, (c) developmental mathematics education, and (d) remedial mathematics courses. The fusion of technology with the traditional lecture format provides additional opportunities for students of various learning styles to engage in the learning process in developmental mathematics (Moore, 1973). Incorporating technology into developmental mathematics has shown great benefits for some students who are required to remediate in the areas of mathematics (Wladis, Offenholley, & George, 2014). Retention and completion rates of students in various instructional formats could help researchers and policymakers further understand students who enroll in developmental education.

Taylor (2008) examined differences in completion rates of students enrolled in a computer assisted remedial mathematics course compared to students enrolled in a traditional lecture format. Both groups for this study showed improvement throughout the term; however, students enrolled in a traditional lecture format had statistically significantly greater improvement. Students who completed a computer-assisted course had more confidence and lower anxiety compared with students in a traditional format. Taylor (2008) further reported that ethnicity, gender, age, and number of previous mathematics course taken were not statistically significant factors in student success in either instructional format.

Instructional methods for mathematics continues to be an area of interest for researchers. Vilardi and Rice (2014) analyzed performance levels of students who enrolled in three different variations of course delivery: (a) online, (b) web-enhanced, and (c) traditional. Students enrolled in a traditional course had greater achievements in mathematics, as determined by end of course GPA averages. Those students enrolled in a traditional mathematics course earned more A's and fewer F's than students enrolled in online and web-enhanced course sections (Vilardi & Rice, 2014).

Utilizing technology in a traditional classroom setting to help increase student success rates in remedial mathematics is another area of importance for increasing success rates in remedial mathematics. Wladis et al. (2014) analyzed methods for improving

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outcomes of students enrolled in traditional remedial mathematics classes. After each student was given a departmental mid-term, a computer-assisted intervention component was available as a resource to increase student success rates. During the initial semester of implementation, students experienced a 50% increase in passing rate for remedial courses. Each semester thereafter the passing rate continued to increase due to computer-assisted interventions (Wladis et al., 2014).

Spradlin and Ackerman (2007) explored differences in the academic performance of developmental mathematics students in a traditional lecture format compared to students enrolled in a traditional lecture format with a computer-assisted instruction component. Participants learned equally in both the traditional format and computer-assisted format; however, females outperformed males regardless of instructional method used. Spradlin and Ackerman (2007) further suggested females gain more knowledge from developmental mathematics courses than males. Moreover, students were receptive to utilizing technology for educational purposes.

Zavarella and Ignash (2009) explored withdrawal and completion rates of students enrolled in developmental mathematics courses with regard to instructional formats. Withdrawal rates were higher for participants enrolled in either the hybrid and/or distant learning formats. Of note was that student learning style had no effect on completion or withdrawal from a developmental mathematics course. Students who deemed themselves face-to-face learners were also more inclined to withdraw from their developmental mathematics course. In addition, placement exam scores did not correlate with a student's ability to complete a developmental mathematics course (Zavarella & Ignash, 2009).

Additional research studies were completed by Zhu and Polianskaia (2007) regarding traditional lecture and computer-assisted mathematics. Students were more likely to enroll in a computer-mediated developmental mathematics course when compared with other instructional formats. However, students who enrolled in a traditional lecture format had higher success rates in developmental mathematics than did students enrolled in a computer-assisted mathematics course. Moreover, males had higher pass rates in traditional lecture format courses. Females had similar success rates to males with lecture formatted developmental mathematics courses (Zhu &Polianskaia, 2007).

Student persistence rates in remedial mathematics is an additional area of importance for researchers. Davidson and Petrosko (2015) examined how factors such as demographics, enrollment status, and family background affected student persistence into a second semester after enrolling in basic algebra. Gender was statistically significant with increasing persistence rates in four cohorts. Family and work obligations affected persistence rates of independent students but had no effect on dependent students. Further, a statistically significant difference was determined with regard to enrollment status for students who completed a remedial mathematics course from Spring 2008 to Fall 2008. Further determined was statistically significant difference with regard to enrollment status for dependent students who completed a remedial mathematics course from Spring 2009 to Fall 2009.Female students had higher persistence rates than their male counterparts (Davidson & Petrosko, 2015).

Ashby, Sadera, and McNary (2011) completed a study in which they compared student success based on the following instructional formats: (a) online, (b) blended, and (c) face-to-face. Student success was based on students earning a grade of 70 or higher, which would then allow the student to enroll in a college-level math course. Ashby et al. (2011) used a convenience sample of 167 students who previously completed remedial math coursework or placed directly into intermediate math based on placement exam scores. Learning environments were determined to play a key role in the success of students in this study with face-to-face students having the highest completion rate at 93%, followed by online students with a 76% completion rate, and blended courses with a 70% completion rate (Ashby et al., 2011).

Incorporating technology into remedial mathematics courses may effectively create opportunities for some students to navigate the remedial mathematics pathway. Colleges and universities are experiencing an increase in non-traditional students who are returning to school to continue their education. The National Center for Education Statistics (1993) defined nontraditional undergraduate students as, "a student over the age of 24, who often has family and work responsibilities as well as other life circumstances that can interfere with successful completion of educational objectives" (para 1). According to the National Council of State Legislatures (2015), computer-assisted classes could benefit the nontraditional student who is unable to access additional campus support due to life circumstances and responsibilities. Various interactive models such as the Assessment and Learning in Knowledge Spaces (ALEKS) are available for education institutions to utilize. Instructional Technology such as ALEKS provides computer based tutoring and adaptive based questioning to best assist a student with learning mathematics (McGraw-Hill, 2014). Nontraditional students can receive academic support through programs, such as ALEKS, that offers tutorials for students as they complete assignments. Students unable to receive academic assistance can utilize computer-assisted software to receive the necessary guidance to complete their respective classes.

Computer-assisted classes provide traditional and nontraditional students with an option to complete their coursework without physically being in a classroom, while also receiving automatic feedback (Shute & Zapata-Rivera, 2007). Students who have sociocultural limitations, have an additional option to complete classes and receive convenient academic support (Shute & Zapata-Rivera, 2007). Computer-assisted classes allow students to work at their own pace and receive assistance as needed based on the learner, which is not always possible in a traditional classroom setting (Shute & Zapata-Rivera, 2007).

Nationally, community colleges are educating students with fewer resources (Mullin, 2010). Computer-assisted learning technology provides institutions with an alternative for instructing more students by allowing faculty to shift their role from a teacher to student advocate in the learning process. Community colleges play an important role in preparing students for college level coursework, with over one half of all community college students enrolling in a remedial class at some point while pursuing their college education (Bailey et al., 2010). Understanding the completion rates for students enrolled in a computer-assisted class compared to traditional classroom setting is important for policymakers and institutional leaders who are faced with retention issues and with educating a population of students who have life situations that prevent them from engaging in the assisted learning services offered within the college.

### *a) Purpose of the Study*

The purpose of this study was to examine the extent to which differences were present in remedial mathematics performance as a function of student enrollment in either a computer-assisted remedial mathematics course or a traditional remedial mathematics course. The following areas were addressed in this study: (a) mathematics success rates of students enrolled in computer-assisted remedial mathematics courses, (b) mathematics success rates of students enrolled in traditional lecture remedial mathematics courses, and (c) changes, if any, that occurred in remedial mathematics performance inthe 2012-2013through the 2014-2015 academic years.

### *b) Significance of the Study*

This research investigation could be used to determine which groups of students are being successful in remedial mathematics courses by instructional method. Students begin the remedial mathematics process, but often fail to complete the sequence (Bahr, 2013). Instructional formats could help policymakers determine if certain groups of students would benefit from a specific instructional format. From this study, future researchers might also investigate learning styles of students required to remediate in mathematics. Additionally, policymakers could develop policies for placement into remedial mathematics courses based on instructional format based on the outcome of this study. Stakeholders and policymakers could also create structural changes to technology assisted courses and traditional remedial mathematics courses to increase student success rates.

### *c) Research Questions*

The following research questions were addressed in this investigation: (a) What is the difference in remedial mathematics success rates as a function of instructional format (i.e., computer-assisted and traditional classroom lecture) of students enrolled in a Texas community college? and (b) What trend, if any, exists in remedial mathematics successrates as a function of instructional format for the 2012-2013 through the 2014-2015 academic years? The first research question was repeated for each of the 3academic years of data analyzed herein.

## II. Method

### *a) Research Design*

Research where the independent variable is not manipulated and random assignments are not utilized is classified as no experimental research (Johnson &Christensen, 2010). In this investigation, data for students who had been enrolled in remedial mathematics courses over a 3-year period were examined. When the independent variable is a categorical variable and the dependent variables have already occurred, this research design is regarded as being causal-comparative in nature (Johnson & Christensen, 2010). In this study, the independent variable wasthe instructional format (i.e., computer-assisted course or a traditional classroom lecture) course. The dependent variables were grades that students earned in a remedial mathematics course.

### *b) Participants and Instrumentation*

Participants were current or former students of a Texas community college and were 18 to 21 years of age. Data examined for this study were from students who completed the following remedial mathematics courses: (a) Math 0404, (b) Math 0406, (c) Math 0407, (d) Math 0408, (e) Math 0410, (f) Math 0411, and (g) Math 0412. Students must have earned a grade of C or better to pass the specified remedial math course.

## III. Results

Remedial mathematics success rates as a function of instructional method was investigated in this study. Instructional methods explored were traditional classroom lecture and computer-assisted instruction. Three academic years of data (i.e., 2012-2013, 2013-2014, and 2014-2015) were analyzed with regard to instructional delivery methods. Results will now be presented by academic year. Because the independent and dependent variables were categorical, Pearson chi-square inferential statistical procedures were used to answer the research questions.

For the 2012-2013 academic year, the Pearson chi-square test resulted in a statistically significant difference, $\chi^2(1) = 11.79$, $p = .001$, with a Cramer's V of .11, in remedial mathematics success rates as a function of the instructional format. Using Cohen's (1988) criteria, a small effect size was present. A higher success rate in remedial mathematics courses was present for students who completed the traditional classroom lecture format, 70.5%, than for students who completed the computer-assisted instructional method, 58.1%. Delineated in Table 1 are the descriptive statistics for the 2012-2013 academic year.

*Table 1:* Success Rates in Remedial Mathematics Courses by Instructional Method for the 2012-2013 Through the 2014-2015 Academic Years

| Year and Instructional Method | Success Rate | Non-Success Rate |
|---|---|---|
| 2012-2013 | | |
| Traditional | 70.5% | 29.5% |
| Computer-Assisted | 58.1% | 41.9% |
| 2013-2014 | | |
| Traditional | 62.6% | 37.4% |
| Computer-Assisted | 41.2% | 58.8% |
| 2014-2015 | | |
| Traditional | 67.2% | 32.8% |
| Computer-Assisted | 57.3% | 42.7% |

Concerning the 2013-2014 academic year, the Pearson chi-square test yielded a statistically significant difference, $\chi^2(1) = 37.80$, $p < .001$, with a Cramer's V of .20, in remedial mathematics success rates as a function of instructional method. Using Cohen's (1988) criteria, a small effect size was present. Similar to the previous academic year results, a higher success rate was present for students who completed the traditional instructional method, 62.6%, than for students who completed the computer-assisted format, 41.2%. Revealed in Table 1 are the descriptive statistics for the 2013-2014 academic year.

With respect to the 2013-2014 academic year, a statistically significant difference was present, $\chi^2(1) = 4.31$, $p = .04$, with a Cramer's V of .07, in remedial mathematics success rates as a function of instructional format. Using Cohen's (1988) criteria, a trivial effect size was present. Congruent with the previous two academic years of results, a higher success rate was present for students who completed the traditional instructional method, 67.2%, than for students who completed the computer-assisted course, 57.3%. Descriptive statistics for this analysis are included on Table 1.

With respect to the 2012-2013, 2013-2014, and 2014-2015 academic years, statistically significant differences were present, albeit with trivial and small effect sizes. In all three academic years, the highest success rates were documented for students who completed remedial mathematics courses in the traditional classroom format than for students who completed remedial mathematics courses in a computer-assisted format. Depicted in Figure 1 are the success rates in remedial mathematics courses in both instructional formats for the 2012-2013 through the 2014-2015 academic years. Completion rates for computer-assisted instruction decreased from the 2012-2013 to 2013-2014 academic year, but increased sharply from the 2013-2014 to 2014-2015 academic year.

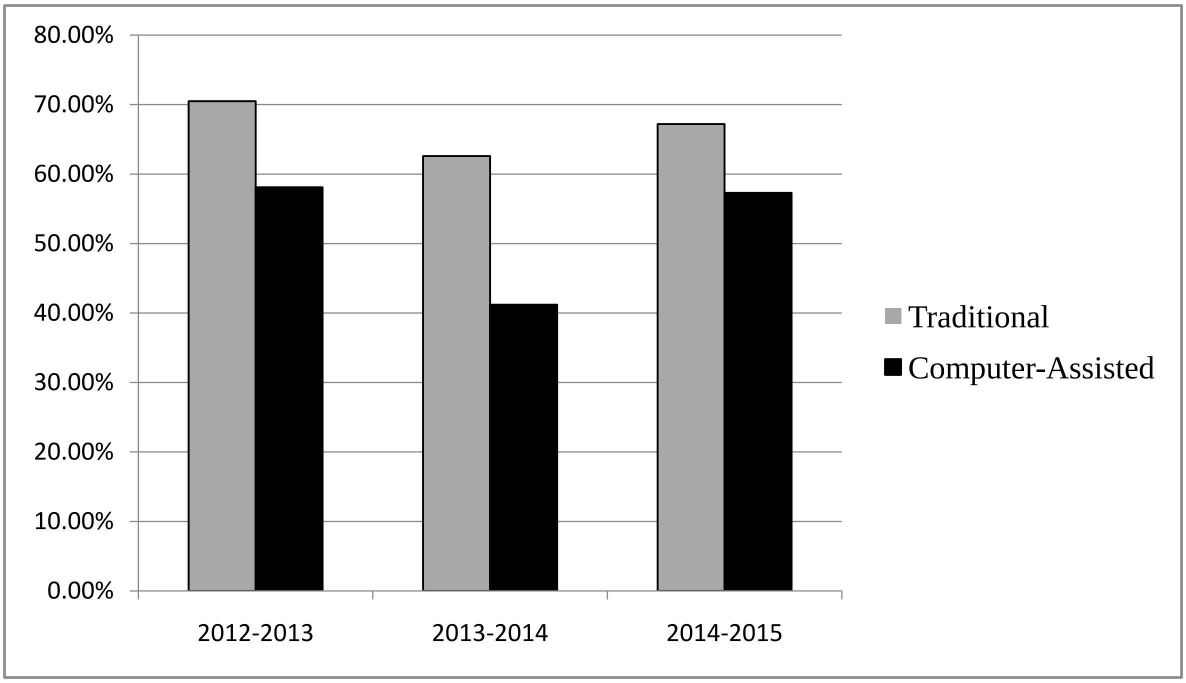


*Figure 1:* Trends for success rates in remedial mathematics courses by instructional method for the 2012-2013 through the 2014-2015 academic years.

## IV. Discussion

For this study, the degree to which success rates in remedial mathematics courses differed as a function of instructional format were analyzed. The two instructional formats of interest were the traditional classroom lecture format and computer-assisted instruction. In analyzing three years of data, students who completed remedial mathematics courses in a traditional instructional method course had higher success rates than students who completed remedial mathematics courses in computer-assisted courses.

### a) Connection to the Related Literature

Students in a remedial mathematics course with a traditional instructional format had a higher success rate than students in a computer assisted course (Ashby, Sadera, & McNary; Vilardi& Rice, 2014; Zhu & Polianskaia, 2007). Computer-assisted remedial mathematics course seems to be a developing model of instruction for some schools. Results from this study were similar to outcomes in previous studies; however, computer-assisted instruction requires more research for an adequate assessment for increasing success rates. Students enrolled in traditional format courses earned higher grades and had higher GPAs (Vilardi & Rice, 2014). For this study, students who completed their remedial mathematics courses in a traditional classroom instructional format had higher success rates than students who completed their remedial mathematics courses in a computer-assisted format. A traditional instructional format is a pedagogical model to which students are more familiar. Most high school mathematics courses are not technology infused. Additional research is need to explore success rates of students in traditional and computer-assisted instruction. Technology is an increasing part of everyday life. Computer-assisted instruction is not a new phenomenon, however, more research investigations are needed to increase success rates for students who enroll in these classes.

### b) Implications for Policy and Practice

Providing alternative instructional methods is beneficial for ensuring that all students have an opportunity to learn (Shute & Zapata, 2007). Students who are unable to attend a face-to-face course need an alternative method to learn, which is where computer-assisted instruction becomes beneficial. Computer-assisted courses have been endorsed by the National Council of State Legislatures (2015) as a means to provide support for students unable to access traditional support as needed. Students who completed a computer-assisted course were reported to have a higher level math competency in mathematics (Trenholm, 2006). However, in the current study, results were not congruent with Trenholm (2006).

Understanding the types of students who enroll in traditional and computer-assisted courses is important for policymakers. Traditional students, ages 18-21, may not require the same level of support for computer assisted instruction. Nontraditional students may require additional support compared to the nontraditional student. Perhaps, a targeted approach to the support provided for both traditional and nontraditional instruction could help increase success rates in remedial mathematics. Nevertheless, more research is needed to explore the differences and the needs of traditional and nontraditional students in terms of computer assisted instruction.

*c) Suggestions for Future Research*

Course instruction is a vital role in the learning process. Today's student encounters additional challenges that make it difficult for the student to learn in a traditional format. Computer-assisted classes provide students with the opportunity to learn at their own pace and receive the support necessary for student success (Shute & Zapata, 2007). More research is needed to determine which students (i.e., traditional or nontraditional) are enrolling in computer-assisted courses and how these students are performing.

Data for this study pertained to traditional age college students. More research should be focused on nontraditional students who enroll in computer-assisted courses. Nontraditional students are more likely to have work and family responsibilities and may choose to enroll in computer-assisted courses. Investigating success rates as a function of age is an area for future researchers to pursue. Another problem to investigate is the advisement available for students who must enroll in remedial mathematics. Because some students are able to complete a computer-assisted remedial mathematics course and other students struggle, investigating this phenomenon would be important for future research regarding how students are advised to select remedial courses. Future researchers should also compare computer-assisted software programs (i.e., ALEKS and My Math Lab) to determine which program has the higher success rate for students enrolled in remedial mathematics.

## V. Conclusion

In this investigation, three years of data on success rates in remedial mathematics courses for students enrolled at a Texas community college were analyzed. Statistically significant differences in remedial mathematics success rates were established in each of the 3 academic years. Students who were enrolled in a traditional lecture format in their remedial mathematics courses had higher success rates than their peers who were enrolled in a computer-assisted format in each of the 3 years of data analyzed here.

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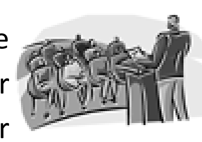

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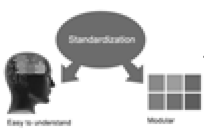

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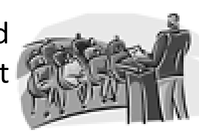

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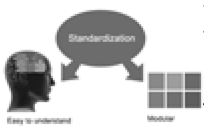


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(b) A brief Summary, "Abstract" (less than 150 words) containing the major results and conclusions.

(c) Up to ten keywords, that precisely identifies the paper's subject, purpose, and focus.

(d) An Introduction, giving necessary background excluding subheadings; objectives must be clearly declared.

(e) Resources and techniques with sufficient complete experimental details (wherever possible by reference) to permit repetition; sources of information must be given and numerical methods must be specified by reference, unless non-standard.

(f) Results should be presented concisely, by well-designed tables and/or figures; the same data may not be used in both; suitable statistical data should be given. All data must be obtained with attention to numerical detail in the planning stage. As reproduced design has been recognized to be important to experiments for a considerable time, the Editor has decided that any paper that appears not to have adequate numerical treatments of the data will be returned un-refereed;

(g) Discussion should cover the implications and consequences, not just recapitulating the results; conclusions should be summarizing.

(h) Brief Acknowledgements.

(i) References in the proper form.

Authors should very cautiously consider the preparation of papers to ensure that they communicate efficiently. Papers are much more likely to be accepted, if they are cautiously designed and laid out, contain few or no errors, are summarizing, and be conventional to the approach and instructions. They will in addition, be published with much less delays than those that require much technical and editorial correction.

The Editorial Board reserves the right to make literary corrections and to make suggestions to improve briefness.

It is vital, that authors take care in submitting a manuscript that is written in simple language and adheres to published guidelines.

**Format**

*Language: The language of publication is UK English. Authors, for whom English is a second language, must have their manuscript efficiently edited by an English-speaking person before submission to make sure that, the English is of high excellence. It is preferable, that manuscripts should be professionally edited.*

Standard Usage, Abbreviations, and Units: Spelling and hyphenation should be conventional to The Concise Oxford English Dictionary. Statistics and measurements should at all times be given in figures, e.g. 16 min, except for when the number begins a sentence. When the number does not refer to a unit of measurement it should be spelt in full unless, it is 160 or greater.

Abbreviations supposed to be used carefully. The abbreviated name or expression is supposed to be cited in full at first usage, followed by the conventional abbreviation in parentheses.

Metric SI units are supposed to generally be used excluding where they conflict with current practice or are confusing. For illustration, 1.4 l rather than 1.4 × 10-3 m3, or 4 mm somewhat than 4 × 10-3 m. Chemical formula and solutions must identify the form used, e.g. anhydrous or hydrated, and the concentration must be in clearly defined units. Common species names should be followed by underlines at the first mention. For following use the generic name should be constricted to a single letter, if it is clear.

**Structure**

All manuscripts submitted to Global Journals Inc. (US), ought to include:

Title: The title page must carry an instructive title that reflects the content, a running title (less than 45 characters together with spaces), names of the authors and co-authors, and the place(s) wherever the work was carried out. The full postal address in addition with the e-mail address of related author must be given. Up to eleven keywords or very brief phrases have to be given to help data retrieval, mining and indexing.

*Abstract, used in Original Papers and Reviews:*

Optimizing Abstract for Search Engines

Many researchers searching for information online will use search engines such as Google, Yahoo or similar. By optimizing your paper for search engines, you will amplify the chance of someone finding it. This in turn will make it more likely to be viewed and/or cited in a further work. Global Journals Inc. (US) have compiled these guidelines to facilitate you to maximize the web-friendliness of the most public part of your paper.

Key Words

A major linchpin in research work for the writing research paper is the keyword search, which one will employ to find both library and Internet resources.

One must be persistent and creative in using keywords. An effective keyword search requires a strategy and planning a list of possible keywords and phrases to try.

Search engines for most searches, use Boolean searching, which is somewhat different from Internet searches. The Boolean search uses "operators," words (and, or, not, and near) that enable you to expand or narrow your affords. Tips for research paper while preparing research paper are very helpful guideline of research paper.

Choice of key words is first tool of tips to write research paper. Research paper writing is an art.A few tips for deciding as strategically as possible about keyword search:

- One should start brainstorming lists of possible keywords before even begin searching. Think about the most important concepts related to research work. Ask, "What words would a source have to include to be truly valuable in research paper?" Then consider synonyms for the important words.
- It may take the discovery of only one relevant paper to let steer in the right keyword direction because in most databases, the keywords under which a research paper is abstracted are listed with the paper.
- One should avoid outdated words.

Keywords are the key that opens a door to research work sources. Keyword searching is an art in which researcher's skills are bound to improve with experience and time.

Numerical Methods: Numerical methods used should be clear and, where appropriate, supported by references.

*Acknowledgements: Please make these as concise as possible.*

References

References follow the Harvard scheme of referencing. References in the text should cite the authors' names followed by the time of their publication, unless there are three or more authors when simply the first author's name is quoted followed by et al. unpublished work has to only be cited where necessary, and only in the text. Copies of references in press in other journals have to be supplied with submitted typescripts. It is necessary that all citations and references be carefully checked before submission, as mistakes or omissions will cause delays.

References to information on the World Wide Web can be given, but only if the information is available without charge to readers on an official site. Wikipedia and Similar websites are not allowed where anyone can change the information. Authors will be asked to make available electronic copies of the cited information for inclusion on the Global Journals Inc. (US) homepage at the judgment of the Editorial Board.

The Editorial Board and Global Journals Inc. (US) recommend that, citation of online-published papers and other material should be done via a DOI (digital object identifier). If an author cites anything, which does not have a DOI, they run the risk of the cited material not being noticeable.

The Editorial Board and Global Journals Inc. (US) recommend the use of a tool such as Reference Manager for reference management and formatting.

Tables, Figures and Figure Legends

*Tables: Tables should be few in number, cautiously designed, uncrowned, and include only essential data. Each must have an Arabic number, e.g. Table 4, a self-explanatory caption and be on a separate sheet. Vertical lines should not be used.*

*Figures: Figures are supposed to be submitted as separate files. Always take in a citation in the text for each figure using Arabic numbers, e.g. Fig. 4. Artwork must be submitted online in electronic form by e-mailing them.*

Preparation of Electronic Figures for Publication

Even though low quality images are sufficient for review purposes, print publication requires high quality images to prevent the final product being blurred or fuzzy. Submit (or e-mail) EPS (line art) or TIFF (halftone/photographs) files only. MS PowerPoint and Word Graphics are unsuitable for printed pictures. Do not use pixel-oriented software. Scans (TIFF only) should have a resolution of at least 350 dpi (halftone) or 700 to 1100 dpi (line drawings) in relation to the imitation size. Please give the data for figures in black and white or submit a Color Work Agreement Form. EPS files must be saved with fonts embedded (and with a TIFF preview, if possible).

For scanned images, the scanning resolution (at final image size) ought to be as follows to ensure good reproduction: line art: >650 dpi; halftones (including gel photographs) : >350 dpi; figures containing both halftone and line images: >650 dpi.

Color Charges: It is the rule of the Global Journals Inc. (US) for authors to pay the full cost for the reproduction of their color artwork. Hence, please note that, if there is color artwork in your manuscript when it is accepted for publication, we would require you to complete and return a color work agreement form before your paper can be published.

*Figure Legends: Self-explanatory legends of all figures should be incorporated separately under the heading 'Legends to Figures'. In the full-text online edition of the journal, figure legends may possibly be truncated in abbreviated links to the full screen version. Therefore, the first 100 characters of any legend should notify the reader, about the key aspects of the figure.*

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Upon approval of a paper for publication, the manuscript will be forwarded to the dean, who is responsible for the publication of the Global Journals Inc. (US).

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(Free of charge) from the following website:

www.adobe.com/products/acrobat/readstep2.html. This will facilitate the file to be opened, read on screen, and printed out in order for any corrections to be added. Further instructions will be sent with the proof.

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Before start writing a good quality Computer Science Research Paper, let us first understand what is Computer Science Research Paper? So, Computer Science Research Paper is the paper which is written by professionals or scientists who are associated to Computer Science and Information Technology, or doing research study in these areas. If you are novel to this field then you can consult about this field from your supervisor or guide.

## TECHNIQUES FOR WRITING A GOOD QUALITY RESEARCH PAPER:

**1. Choosing the topic:** In most cases, the topic is searched by the interest of author but it can be also suggested by the guides. You can have several topics and then you can judge that in which topic or subject you are finding yourself most comfortable. This can be done by asking several questions to yourself, like Will I be able to carry our search in this area? Will I find all necessary recourses to accomplish the search? Will I be able to find all information in this field area? If the answer of these types of questions will be "Yes" then you can choose that topic. In most of the cases, you may have to conduct the surveys and have to visit several places because this field is related to Computer Science and Information Technology. Also, you may have to do a lot of work to find all rise and falls regarding the various data of that subject. Sometimes, detailed information plays a vital role, instead of short information.

**2. Evaluators are human:** First thing to remember that evaluators are also human being. They are not only meant for rejecting a paper. They are here to evaluate your paper. So, present your Best.

**3. Think Like Evaluators:** If you are in a confusion or getting demotivated that your paper will be accepted by evaluators or not, then think and try to evaluate your paper like an Evaluator. Try to understand that what an evaluator wants in your research paper and automatically you will have your answer.

**4. Make blueprints of paper:** The outline is the plan or framework that will help you to arrange your thoughts. It will make your paper logical. But remember that all points of your outline must be related to the topic you have chosen.

**5. Ask your Guides:** If you are having any difficulty in your research, then do not hesitate to share your difficulty to your guide (if you have any). They will surely help you out and resolve your doubts. If you can't clarify what exactly you require for your work then ask the supervisor to help you with the alternative. He might also provide you the list of essential readings.

**6. Use of computer is recommended:** As you are doing research in the field of Computer Science, then this point is quite obvious.

**7. Use right software:** Always use good quality software packages. If you are not capable to judge good software then you can lose quality of your paper unknowingly. There are various software programs available to help you, which you can get through Internet.

**8. Use the Internet for help:** An excellent start for your paper can be by using the Google. It is an excellent search engine, where you can have your doubts resolved. You may also read some answers for the frequent question how to write my research paper or find model research paper. From the internet library you can download books. If you have all required books make important reading selecting and analyzing the specified information. Then put together research paper sketch out.

**9. Use and get big pictures:** Always use encyclopedias, Wikipedia to get pictures so that you can go into the depth.

**10. Bookmarks are useful:** When you read any book or magazine, you generally use bookmarks, right! It is a good habit, which helps to not to lose your continuity. You should always use bookmarks while searching on Internet also, which will make your search easier.

**11. Revise what you wrote:** When you write anything, always read it, summarize it and then finalize it.

**12. Make all efforts:** Make all efforts to mention what you are going to write in your paper. That means always have a good start. Try to mention everything in introduction, that what is the need of a particular research paper. Polish your work by good skill of writing and always give an evaluator, what he wants.

**13. Have backups:** When you are going to do any important thing like making research paper, you should always have backup copies of it either in your computer or in paper. This will help you to not to lose any of your important.

**14. Produce good diagrams of your own:** Always try to include good charts or diagrams in your paper to improve quality. Using several and unnecessary diagrams will degrade the quality of your paper by creating "hotchpotch." So always, try to make and include those diagrams, which are made by your own to improve readability and understandability of your paper.

**15. Use of direct quotes:** When you do research relevant to literature, history or current affairs then use of quotes become essential but if study is relevant to science then use of quotes is not preferable.

**16. Use proper verb tense:** Use proper verb tenses in your paper. Use past tense, to present those events that happened. Use present tense to indicate events that are going on. Use future tense to indicate future happening events. Use of improper and wrong tenses will confuse the evaluator. Avoid the sentences that are incomplete.

**17. Never use online paper:** If you are getting any paper on Internet, then never use it as your research paper because it might be possible that evaluator has already seen it or maybe it is outdated version.

**18. Pick a good study spot:** To do your research studies always try to pick a spot, which is quiet. Every spot is not for studies. Spot that suits you choose it and proceed further.

**19. Know what you know:** Always try to know, what you know by making objectives. Else, you will be confused and cannot achieve your target.

**20. Use good quality grammar:** Always use a good quality grammar and use words that will throw positive impact on evaluator. Use of good quality grammar does not mean to use tough words, that for each word the evaluator has to go through dictionary. Do not start sentence with a conjunction. Do not fragment sentences. Eliminate one-word sentences. Ignore passive voice. Do not ever use a big word when a diminutive one would suffice. Verbs have to be in agreement with their subjects. Prepositions are not expressions to finish sentences with. It is incorrect to ever divide an infinitive. Avoid clichés like the disease. Also, always shun irritating alliteration. Use language that is simple and straight forward. put together a neat summary.

**21. Arrangement of information:** Each section of the main body should start with an opening sentence and there should be a changeover at the end of the section. Give only valid and powerful arguments to your topic. You may also maintain your arguments with records.

**22. Never start in last minute:** Always start at right time and give enough time to research work. Leaving everything to the last minute will degrade your paper and spoil your work.

**23. Multitasking in research is not good:** Doing several things at the same time proves bad habit in case of research activity. Research is an area, where everything has a particular time slot. Divide your research work in parts and do particular part in particular time slot.

**24. Never copy others' work:** Never copy others' work and give it your name because if evaluator has seen it anywhere you will be in trouble.

**25. Take proper rest and food:** No matter how many hours you spend for your research activity, if you are not taking care of your health then all your efforts will be in vain. For a quality research, study is must, and this can be done by taking proper rest and food.

**26. Go for seminars:** Attend seminars if the topic is relevant to your research area. Utilize all your resources.

**27. Refresh your mind after intervals:** Try to give rest to your mind by listening to soft music or by sleeping in intervals. This will also improve your memory.

**28. Make colleagues:** Always try to make colleagues. No matter how sharper or intelligent you are, if you make colleagues you can have several ideas, which will be helpful for your research.

**29. Think technically:** Always think technically. If anything happens, then search its reasons, its benefits, and demerits.

**30. Think and then print:** When you will go to print your paper, notice that tables are not be split, headings are not detached from their descriptions, and page sequence is maintained.

**31. Adding unnecessary information:** Do not add unnecessary information, like, I have used MS Excel to draw graph. Do not add irrelevant and inappropriate material. These all will create superfluous. Foreign terminology and phrases are not apropos. One should NEVER take a broad view. Analogy in script is like feathers on a snake. Not at all use a large word when a very small one would be sufficient. Use words properly, regardless of how others use them. Remove quotations. Puns are for kids, not grunt readers. Amplification is a billion times of inferior quality than sarcasm.

**32. Never oversimplify everything:** To add material in your research paper, never go for oversimplification. This will definitely irritate the evaluator. Be more or less specific. Also too, by no means, ever use rhythmic redundancies. Contractions aren't essential and shouldn't be there used. Comparisons are as terrible as clichés. Give up ampersands and abbreviations, and so on. Remove commas, that are, not necessary. Parenthetical words however should be together with this in commas. Understatement is all the time the complete best way to put onward earth-shaking thoughts. Give a detailed literary review.

**33. Report concluded results:** Use concluded results. From raw data, filter the results and then conclude your studies based on measurements and observations taken. Significant figures and appropriate number of decimal places should be used. Parenthetical remarks are prohibitive. Proofread carefully at final stage. In the end give outline to your arguments. Spot out perspectives of further study of this subject. Justify your conclusion by at the bottom of them with sufficient justifications and examples.

**34. After conclusion:** Once you have concluded your research, the next most important step is to present your findings. Presentation is extremely important as it is the definite medium though which your research is going to be in print to the rest of the crowd. Care should be taken to categorize your thoughts well and present them in a logical and neat manner. A good quality research paper format is essential because it serves to highlight your research paper and bring to light all necessary aspects in your research.

## Informal Guidelines of Research Paper Writing

**Key points to remember:**

- Submit all work in its final form.
- Write your paper in the form, which is presented in the guidelines using the template.
- Please note the criterion for grading the final paper by peer-reviewers.

**Final Points:**

A purpose of organizing a research paper is to let people to interpret your effort selectively. The journal requires the following sections, submitted in the order listed, each section to start on a new page.

The introduction will be compiled from reference matter and will reflect the design processes or outline of basis that direct you to make study. As you will carry out the process of study, the method and process section will be constructed as like that. The result segment will show related statistics in nearly sequential order and will direct the reviewers next to the similar intellectual paths throughout the data that you took to carry out your study. The discussion section will provide understanding of the data and projections as to the implication of the results. The use of good quality references all through the paper will give the effort trustworthiness by representing an alertness of prior workings.

Writing a research paper is not an easy job no matter how trouble-free the actual research or concept. Practice, excellent preparation, and controlled record keeping are the only means to make straightforward the progression.

**General style:**

Specific editorial column necessities for compliance of a manuscript will always take over from directions in these general guidelines.

To make a paper clear

· Adhere to recommended page limits

Mistakes to evade

- Insertion a title at the foot of a page with the subsequent text on the next page
- Separating a table/chart or figure - impound each figure/table to a single page
- Submitting a manuscript with pages out of sequence

In every sections of your document

· Use standard writing style including articles ("a", "the," etc.)

· Keep on paying attention on the research topic of the paper

· Use paragraphs to split each significant point (excluding for the abstract)

· Align the primary line of each section

· Present your points in sound order

· Use present tense to report well accepted

· Use past tense to describe specific results

· Shun familiar wording, don't address the reviewer directly, and don't use slang, slang language, or superlatives

· Shun use of extra pictures - include only those figures essential to presenting results

**Title Page:**

Choose a revealing title. It should be short. It should not have non-standard acronyms or abbreviations. It should not exceed two printed lines. It should include the name(s) and address (es) of all authors.

**Abstract:**

The summary should be two hundred words or less. It should briefly and clearly explain the key findings reported in the manuscript--must have precise statistics. It should not have abnormal acronyms or abbreviations. It should be logical in itself. Shun citing references at this point.

An abstract is a brief distinct paragraph summary of finished work or work in development. In a minute or less a reviewer can be taught the foundation behind the study, common approach to the problem, relevant results, and significant conclusions or new questions.

Write your summary when your paper is completed because how can you write the summary of anything which is not yet written? Wealth of terminology is very essential in abstract. Yet, use comprehensive sentences and do not let go readability for briefness. You can maintain it succinct by phrasing sentences so that they provide more than lone rationale. The author can at this moment go straight to shortening the outcome. Sum up the study, with the subsequent elements in any summary. Try to maintain the initial two items to no more than one ruling each.

- Reason of the study - theory, overall issue, purpose
- Fundamental goal
- To the point depiction of the research
- Consequences, including definite statistics - if the consequences are quantitative in nature, account quantitative data; results of any numerical analysis should be reported
- Significant conclusions or questions that track from the research(es)

Approach:

- Single section, and succinct
- As a outline of job done, it is always written in past tense
- A conceptual should situate on its own, and not submit to any other part of the paper such as a form or table
- Center on shortening results - bound background information to a verdict or two, if completely necessary
- What you account in an conceptual must be regular with what you reported in the manuscript
- Exact spelling, clearness of sentences and phrases, and appropriate reporting of quantities (proper units, important statistics) are just as significant in an abstract as they are anywhere else

**Introduction:**

The **Introduction** should "introduce" the manuscript. The reviewer should be presented with sufficient background information to be capable to comprehend and calculate the purpose of your study without having to submit to other works. The basis for the study should be offered. Give most important references but shun difficult to make a comprehensive appraisal of the topic. In the introduction, describe the problem visibly. If the problem is not acknowledged in a logical, reasonable way, the reviewer will have no attention in your result. Speak in common terms about techniques used to explain the problem, if needed, but do not present any particulars about the protocols here. Following approach can create a valuable beginning:

- Explain the value (significance) of the study
- Shield the model - why did you employ this particular system or method? What is its compensation? You strength remark on its appropriateness from a abstract point of vision as well as point out sensible reasons for using it.
- Present a justification. Status your particular theory (es) or aim(s), and describe the logic that led you to choose them.
- Very for a short time explain the tentative propose and how it skilled the declared objectives.

Approach:

- Use past tense except for when referring to recognized facts. After all, the manuscript will be submitted after the entire job is done.
- Sort out your thoughts; manufacture one key point with every section. If you make the four points listed above, you will need a least of four paragraphs.

- Present surroundings information only as desirable in order hold up a situation. The reviewer does not desire to read the whole thing you know about a topic.
- Shape the theory/purpose specifically - do not take a broad view.
- As always, give awareness to spelling, simplicity and correctness of sentences and phrases.

**Procedures (Methods and Materials):**

This part is supposed to be the easiest to carve if you have good skills. A sound written Procedures segment allows a capable scientist to replacement your results. Present precise information about your supplies. The suppliers and clarity of reagents can be helpful bits of information. Present methods in sequential order but linked methodologies can be grouped as a segment. Be concise when relating the protocols. Attempt for the least amount of information that would permit another capable scientist to spare your outcome but be cautious that vital information is integrated. The use of subheadings is suggested and ought to be synchronized with the results section. When a technique is used that has been well described in another object, mention the specific item describing a way but draw the basic principle while stating the situation. The purpose is to text all particular resources and broad procedures, so that another person may use some or all of the methods in one more study or referee the scientific value of your work. It is not to be a step by step report of the whole thing you did, nor is a methods section a set of orders.

Materials:

- Explain materials individually only if the study is so complex that it saves liberty this way.
- Embrace particular materials, and any tools or provisions that are not frequently found in laboratories.
- Do not take in frequently found.
- If use of a definite type of tools.
- Materials may be reported in a part section or else they may be recognized along with your measures.

Methods:

- Report the method (not particulars of each process that engaged the same methodology)
- Describe the method entirely
- To be succinct, present methods under headings dedicated to specific dealings or groups of measures
- Simplify - details how procedures were completed not how they were exclusively performed on a particular day.
- If well known procedures were used, account the procedure by name, possibly with reference, and that's all.

Approach:

- It is embarrassed or not possible to use vigorous voice when documenting methods with no using first person, which would focus the reviewer's interest on the researcher rather than the job. As a result when script up the methods most authors use third person passive voice.
- Use standard style in this and in every other part of the paper - avoid familiar lists, and use full sentences.

What to keep away from

- Resources and methods are not a set of information.
- Skip all descriptive information and surroundings - save it for the argument.
- Leave out information that is immaterial to a third party.

**Results:**

The principle of a results segment is to present and demonstrate your conclusion. Create this part a entirely objective details of the outcome, and save all understanding for the discussion.

The page length of this segment is set by the sum and types of data to be reported. Carry on to be to the point, by means of statistics and tables, if suitable, to present consequences most efficiently.You must obviously differentiate material that would usually be incorporated in a study editorial from any unprocessed data or additional appendix matter that would not be available. In fact, such matter should not be submitted at all except requested by the instructor.

Content

- Sum up your conclusion in text and demonstrate them, if suitable, with figures and tables.
- In manuscript, explain each of your consequences, point the reader to remarks that are most appropriate.
- Present a background, such as by describing the question that was addressed by creation an exacting study.
- Explain results of control experiments and comprise remarks that are not accessible in a prescribed figure or table, if appropriate.
- Examine your data, then prepare the analyzed (transformed) data in the form of a figure (graph), table, or in manuscript form.

What to stay away from

- Do not discuss or infer your outcome, report surroundings information, or try to explain anything.
- Not at all, take in raw data or intermediate calculations in a research manuscript.
- Do not present the similar data more than once.
- Manuscript should complement any figures or tables, not duplicate the identical information.
- Never confuse figures with tables - there is a difference.

Approach

- As forever, use past tense when you submit to your results, and put the whole thing in a reasonable order.
- Put figures and tables, appropriately numbered, in order at the end of the report
- If you desire, you may place your figures and tables properly within the text of your results part.

Figures and tables

- If you put figures and tables at the end of the details, make certain that they are visibly distinguished from any attach appendix materials, such as raw facts
- Despite of position, each figure must be numbered one after the other and complete with subtitle
- In spite of position, each table must be titled, numbered one after the other and complete with heading
- All figure and table must be adequately complete that it could situate on its own, divide from text

**Discussion:**

The Discussion is expected the trickiest segment to write and describe. A lot of papers submitted for journal are discarded based on problems with the Discussion. There is no head of state for how long a argument should be. Position your understanding of the outcome visibly to lead the reviewer through your conclusions, and then finish the paper with a summing up of the implication of the study. The purpose here is to offer an understanding of your results and hold up for all of your conclusions, using facts from your research and generally accepted information, if suitable. The implication of result should be visibly described. Infer your data in the conversation in suitable depth. This means that when you clarify an observable fact you must explain mechanisms that may account for the observation. If your results vary from your prospect, make clear why that may have happened. If your results agree, then explain the theory that the proof supported. It is never suitable to just state that the data approved with prospect, and let it drop at that.

- Make a decision if each premise is supported, discarded, or if you cannot make a conclusion with assurance. Do not just dismiss a study or part of a study as "uncertain."
- Research papers are not acknowledged if the work is imperfect. Draw what conclusions you can based upon the results that you have, and take care of the study as a finished work
- You may propose future guidelines, such as how the experiment might be personalized to accomplish a new idea.
- Give details all of your remarks as much as possible, focus on mechanisms.
- Make a decision if the tentative design sufficiently addressed the theory, and whether or not it was correctly restricted.
- Try to present substitute explanations if sensible alternatives be present.
- One research will not counter an overall question, so maintain the large picture in mind, where do you go next? The best studies unlock new avenues of study. What questions remain?
- Recommendations for detailed papers will offer supplementary suggestions.

Approach:

- When you refer to information, differentiate data generated by your own studies from available information
- Submit to work done by specific persons (including you) in past tense.
- Submit to generally acknowledged facts and main beliefs in present tense.

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| Topics | Grades | | |
|---|---|---|---|
| | **A-B** | **C-D** | **E-F** |
| ***Abstract*** | Clear and concise with appropriate content, Correct format. 200 words or below | Unclear summary and no specific data, Incorrect form<br><br>Above 200 words | No specific data with ambiguous information<br><br>Above 250 words |
| ***Introduction*** | Containing all background details with clear goal and appropriate details, flow specification, no grammar and spelling mistake, well organized sentence and paragraph, reference cited | Unclear and confusing data, appropriate format, grammar and spelling errors with unorganized matter | Out of place depth and content, hazy format |
| ***Methods and Procedures*** | Clear and to the point with well arranged paragraph, precision and accuracy of facts and figures, well organized subheads | Difficult to comprehend with embarrassed text, too much explanation but completed | Incorrect and unorganized structure with hazy meaning |
| ***Result*** | Well organized, Clear and specific, Correct units with precision, correct data, well structuring of paragraph, no grammar and spelling mistake | Complete and embarrassed text, difficult to comprehend | Irregular format with wrong facts and figures |
| ***Discussion*** | Well organized, meaningful specification, sound conclusion, logical and concise explanation, highly structured paragraph reference cited | Wordy, unclear conclusion, spurious | Conclusion is not cited, unorganized, difficult to comprehend |
| ***References*** | Complete and correct format, well organized | Beside the point, Incomplete | Wrong format and structuring |

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