Sociology

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Chapter 7: Social Movements and Mass Media in a Global Context
From *The Wiley Blackwell Companion to Social Movements, 2nd Edition*
by David A. Snow, Sarah A. Soule, Hanspeter Kriesi, and Holly J. McCammon

Chapter 19: Nonviolent and Violent Trajectories in Social Movements
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Social Movements and Mass Media in a Global Context

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You will not be able to stay home, brother.
You will not be able to plug in, turn on and cop out.
You will not be able to lose yourself on skag
and skip out for beer during commercials,
because the revolution will not be televised.

From the poem and song "The Revolution Will Not Be Televised"
by Gil Scott-Heron, 1970

Introduction

Struck by the dramatic differences in what he saw on television and the protests he witnessed on American college campuses, Gil Scott-Heron used prose to remind activists that media were unfriendly to causes that could not be "brought to you by Xerox in 4 parts without commercial interruptions" ("The Revolution Will Not Be Televised" 1970). Times – and mass media – have changed. In the digital era, the revolution may not be televised, but it probably will be tweeted, blogged, vined, and snapped around the world. Indeed, recent collective actions, such as the Arab Spring, the Occupy movement, the anti-austerity protests, and Never Again, underscore the importance of mass media for social movements.

There are two important limitations in the existing scholarship on social movements and mass media. The first shortcoming is the overemphasis on outcomes. Scholars try to connect strategy, or the link activists make between how they deploy their resources to achieve their goals and their relative success at doing so, to tangible outcomes (Gamson 1990; Ganz 2000). Naturally, this focuses attention on

The Wiley Blackwell Companion to Social Movements, Second Edition. Edited by David A. Snow, Sarah A. Soule, Hanspeter Kriesi, and Holly J. McCammon.
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the effectiveness of easily measurable outcomes, such as mainstream news coverage (Amenta et al. 2012; Andrews and Caren 2010; Rohlinger 2002; Ryan 1991) or mobilization of individuals in the digital and real worlds (Bennett 2012; Earl and Kimport 2011; Fisher et al. 2005; Mercea 2012; and see Chapter 16 by Earl, in this volume, on technology and social media). The problem is that getting mainstream media attention and mobilizing people to action are not the only reasons activists use mass media. Movement groups also use mass media to communicate with niche (sometimes sympathetic) audiences, develop a collective identity outside the prying eyes of a broader public, and engage in artistic expression (Futrell and Simi 2004; Nip 2004; Roscigno and Danaher 2004). Likewise, activists use mass media to affect cultural change and improve their political legitimacy; the success of which is much more difficult to measure (Rochon 1998). Finally, the focus on outcomes ignores that activists sometimes prioritize authentic communication over media coverage (Sobieraj 2011) and that activists often use very different mediums simultaneously in their social change efforts (Rohlinger 2015).

The second, and more glaring, shortcoming is that sociologists studying movements and mass media rarely consider the applicability of their concepts across political contexts. Most research on the movement-media relationship is country specific. Focusing on one country makes empirical sense as the particulars of a national context shape the relationship between activists and mass media. However, given that social movements increasingly engage in global claims-making (Mattoni 2012), and movements exist in a variety of different national contexts, it is critical that scholars develop conceptual frameworks that transcend the boundaries of the nation-state. For example, the notion that ideas can "cross-over" or move from partisan outlets to mainstream ones is compelling in political contexts such as the US that are relatively open to outsider claims (Berry and Sobieraj 2014; Rohlinger and Brown 2013). Cross-over, however, is virtually irrelevant in authoritarian countries where media are state-controlled and heavily censored. Likewise, "polite protest," or the use of coded language to subtly challenge state positions and actions online, is necessary in China (Yang 2013) but would have little traction in the US media environment, where outlandish rhetoric and creative insults get activists in the news.

This chapter summarizes and extends the existing literature on the movement-media relationship in an attempt to address these two shortcomings. To do so, we offer a strategic choice model which outlines how activists operating in different political contexts use mass media – which includes traditional outlets such as newspapers and television as well as Internet Communication Technologies (ICTs) and social media – to affect change in ways that are (in)visible to a general public. Our model is comprised of two dimensions central to determining how activists use mass media: the *target* of activist communication and the relative openness of a state's *media system*. These two dimensions highlight which mediums activists use in their strategic efforts (and how they use them) as well as the risks associated with these decisions in different political contexts. We use the existing, and increasingly interdisciplinary, literature on social movements and mass media to outline the utility of the strategic choice approach. We conclude the chapter by outlining avenues for future research.

A Strategic Choice Model

Strategy is the lifeblood of social movements. Activists make choices about how to deploy their resources in ways they deem likely to advance their goals (Maney et al. 2012; McCammon 2012). This is no less true of media strategy. Activists craft messages for a particular audience and disseminate their ideas via mediums that they think will help them reach their targets (Rohlinger 2015). As a starting point for understanding how activists use mass media to affect change across space, time, and political contexts, we argue that scholars should consider: (1) the target of communication; and (2) the media context in which activists are operating. Using these two key dimensions, we propose a Strategic Choice Model (see Table 7.1).

Activists use different mass media to talk to different audiences. When activists want to sell their ideas to a broader public and mobilize bystanders to action, they target general interest media outlets such as newspapers and the nightly news to communicate with large swaths of the citizenry (Gamson 1990; Gamson and Meyer 1996; Sobieraj 2010). In contrast, when activists want to update their members about movement activities or get feedback from supporters on movement strategies, they target mediums (and programs) watched, listened to, or navigated to by sympathetic publics (see Chapter 16 by Earl, in this volume, on technology and social media). In Canada and the US, for instance, conservatives have a long history of using radio, rather than general interest media, to reach and mobilize sympathetic publics to action (Fetner and Sanders 2012; Jamieson and Cappella 2010). Likewise, if activists want to engage in creative expression, or cultivate "free spaces" for those interested in movement ideas to engage in dialogue, they use everything from music and newsletters to websites and social media (Earl and Kimport 2011; Eyerman and Jamison 1998, Nip 2004; Wald 1998). Given that activists use different mediums for different purposes, it is important to distinguish the targets of activists' communication and, specifically, whether they are trying to reach *external mass audiences* or *internal and sympathetic audiences*.

It also is necessary to consider how the relationship between the state and mass media affects activists' decision-making regarding which medium to use and to what end. The state's relative control over mass media and which news gets circulated to the citizenry varies dramatically globally.[1] Consequently, some *media systems* are more open to challenger claims than others, which affect the strategic calculations that activists make. In relatively open media systems, such as the US, Canada, the UK, Ireland, France, the Netherlands, and Germany, the state has limited control over what information news outlets circulate to the citizenry. Consequently, challengers looking to raise awareness regarding their efforts to change one or more aspects of the political system and mobilize citizens to action may have an opportunity to use mass media to do so. In relatively closed media systems, such as transitional governments like Egypt during the Arab Spring, Italy, Ukraine, China, and some Latin American countries, the state has a great deal of control over what news is covered and how. State actors in these contexts often use mass media to maintain their authority and control over the citizenry, and, as a result, accurate coverage of movements and movement claims is virtually nonexistent.

Table 7.1 Strategic choice model

		Media target	
		External audiences	*Supporters and sympathetic audiences*
Relatively open system	Type of media	Broad range of mediums and platforms available to activists including news, op-eds, social media, commercial media (e.g. music and books), and organizational websites.	Broad range of mediums and platforms available to activists including social media, discussion boards, newsletters, email, partisan media, and organizational websites.
	Use of media	Educate the broader public about movement claims, mobilize a public to action, and frame political debates.	Cultivate collective identity, build alternative institutions, and mobilize support or action among sympathizers on movement issues.
	Obstacles and risks	Obstacles include media expertise, the profit focus of mainstream and social media, journalistic routines, and government intervention. Risks include marginalization, censorship, trolling, and covert repression.	Obstacles include organizational resources (time, skill, and connections). Risks include hacking, trolling, and marginalization.
Relatively closed system	Type of media	Limited range of mediums and platforms available to activists who want to avoid repression. Activists who want to attract international attention may try to provoke repression in order to spark international outrage.	Limited range of mediums and platforms available to activists, especially since groups may not be able to create platforms (e.g. websites, newsletters, or discussion forums) that allow them to speak to sympathizers directly.
	Use of media	Educate the broader public, nationally and internationally, through either polite protest or tactics that invite repression, and, hopefully, create international visibility.	Cultivate collective identity and mobilize consensus and support among sympathizers on movement issues.
	Obstacles and risks	Obstacles include state ownership and censorship. Risks include hacking, trolling, overt repression, and death.	Obstacles include state regulation of Internet access and censorship. Risks include hacking, trolling, overt repression, and death.

Again, this model does not focus on media coverage, but on how activists strategically choose venues that allow them to put forward their goals in a political context that may be more or less amenable to their claims. This shift is important because: (1) it considers the various types of mediums, including ICTs, available for challengers' use; (2) it complicates the intent of activists' media use; and (3) it highlights the obstacles and risks challengers face when using mass media in their political projects (see Table 7.1).

Consider the range of options available to activists operating in relatively open media systems. Activists can use news media, music, books, op-eds, political blogs, organizational websites, and social media (among others) to educate the broader public about their cause and their suggested solutions (Isaac 2012; Lievrouw 2011; Theocharis et al. 2015). Challengers who want to communicate with supporters directly can easily target sympathetic media outlets or use ICTs to create virtual spaces for conversation and connection (Earl and Kimport 2011; Rohlinger et al. 2012). As we discuss in detail below, activists face obstacles and risks when they try to connect with a broader public even within relatively open systems. For example, if challengers want their ideas included in mainstream news coverage, they must understand how their media targets operate and the potential biases of those in charge. Even when activists do so, they run the risk of being marginalized in coverage (Gitlin 1980) or, if they engage in illegal activities to draw attention to their issues, of being arrested. However, relying on free social media platforms such as Facebook and Twitter do not remove obstacles and risks. Activists must have the time, skill, and connections to use social media effectively, especially if their issues are likely to attract trolls or hackers.

Activists operating in relatively closed systems, in contrast, have far fewer ways to reach a broader public and face far more risks when the state becomes aware of their efforts to affect political change. Since the state uses mass media to control what (and how) information is disseminated to the citizenry, challengers who want to raise collective consciousness about an issue or mobilize supporters to action must use mediums, such as low-powered radio, art, music, poetry, and traveling political theater, which can fly under the radar of authorities. For instance, the Latin American Boom in the 1960s and 1970s illustrates that activists can use commercial products such as poetry and novels to carefully challenge the political status quo; at least until their work is identified by the state as potentially revolutionary. Of course, using mass media is far more dangerous in countries where the media system is relatively closed. Activists who choose to criticize power holders publicly may find themselves jailed, tortured, or put to death. Despite these risks, some activists will try to use mass media to attract international attention to their causes. As we discuss below, provoking repressive action from the state can be an effective way to both get media attention and mobilize global audiences to pressure a government to change its practices or policies (Keck and Sikkink 1998).

There are three additional points worth making about the strategic choice model. First, media systems should be understood as a continuum along which relatively open and relatively closed represent two general poles. Countries are arrayed along this continuum and there is no ideal model of either pole. Second, media systems are not static. A state's position on the continuum can change over time and in response to political exigencies, such as revolutions and regime changes. Finally, media targets

are not mutually exclusive categories. Activists, particularly those operating in relatively closed media systems, have limited opportunities to use media and, consequently, may talk to multiple targets simultaneously, particularly when the risk of repression is high. In short, the strategic choice model is a starting point for understanding how activists' media choices are tied to their political contexts. The remainder of the chapter uses the existing literature on social movement and mass media to highlight the utility of the strategic choice model in different media systems.

Challenging the Status Quo in Open Systems

In countries where the political system is relatively open, social movement actors have access to a broad range of mass media, from traditional news media to social media and organizational websites. The choices activists make regarding how to use media largely depend upon their intended target of communication. However, as we discuss below, activists do not necessarily achieve their desired goals even in a relatively open media system. We outline the obstacles and risks activists' in these systems face.

Using media to target external audiences

Movement actors use mass media to target external audiences in order to spread information about a cause to the broader public, shape political debates and outcomes, and mobilize bystander publics to action. There are a variety of ways that movements can use mass media to disseminate information in an open system. Activists can target general interest media outlets, such as newspapers, radio, and television news, in an effort to get their ideas to large and diverse audiences (Andrews and Caren 2010; Gamson 1990; Ryan 1991). This serves two primary purposes. First, media coverage in general interest outlets can create an opportunity for movement actors to challenge elite power and perspectives as well as shape political debates (Gamson and Meyer 1996; Rojecki 1999). There are a number of examples where movement actors have successfully opened public discourse and affected policy debates around an issue. For example, Sampedro's (1997) work on the anti-military movements in Spain between 1976 and 1993 shows how the movement used media to challenge compulsory military service and pass conscientious objector legislation. Likewise, in 1963, American Civil Rights activists brought the brutality of Southern law enforcement against African Americans into homes worldwide by accessing more sympathetic media in the North (Berger 2011; McAdam 1996). A mere month after Bull Connor had his deputies turn high-pressure fire hoses on black youth, John F. Kennedy publicly promised legislative change.

Second, movement actors use media to mobilize individuals to action (McCarthy and Zald 1977; Snow and Benford 1992). Coverage of the race riots in the USA, for example, helped spread collective protests – and the idea that the riots were a response to racial inequality – within and across cities (Myers 2000), but did not build long-term support for the Black Power Movement (Davenport 2009). Media coverage in mainstream outlets, even if the coverage is negative (Koopmans 2004),

can help movements grow their support and membership ranks. Vliegnenthart and his colleagues (2005), for example, found that even just mentioning the name of a movement group in coverage increased its membership.

Activists do not have to rely on mainstream media alone in the digital age. ICTs have dramatically altered how activists communicate with the general public. Movement actors can create websites, open social media accounts, and even construct alternative outlets in an attempt to communicate their issues and goals to a larger audience (Bennett and Segerberg 2012; Earl et al. 2010). These outlets are strategically appealing because activists have more control over how their ideas and issues are presented. For example, activists created Independent Media Centers such as Indymedia to communicate their issues and experiences in their own words when mainstream media were less receptive to their messages (Lievrouw 2011). Websites like Idle No More employs livestreams and webinars to disseminate information about a variety of issues facing Indigenous peoples internationally, and pro-choice activists use the hashtag #ShoutYourAbortion to encourage women to share their stories about how choosing the timing and number of their children is empowering rather than shameful.

Of course, mediums do not operate in isolation. There is evidence that the ideas activists circulate in virtual spaces, given the right conditions, can get picked up by mainstream outlets (Rohlinger and Brown 2013). Organizational websites, online forums, and social media play an important role in mobilization as well (Carty 2015; Earl and Kimport 2011; Fisher et al. 2005, and see Chapter 16 by Earl, in this volume, on technology and social media). ICTs have helped activists mobilize citizens into movements such as Occupy Wall Street and the Tea Party movement (Castells 2012; Gerbaudo 2012; Rohlinger and Bunnage 2015), around causes as diverse as the Vinegar Protests in Brazil, the Indignado protests in Spain (Bastos, Mercea, and Charpentier 2015), and the #soblakaustralia campaign (Dreher, McCallum, and Waller 2016).

Using media to target internal and sympathetic audiences

Activists are not always interested in framing the debate for or mobilizing a general public. When movement actors are testing out new ideas, for instance, they often disseminate their frames in politically like-minded outlets in order to see how members and sympathetic publics respond (Koopmans 2004; Rohlinger 2007). When actors strategically use media aimed at internal and sympathetic audiences, they often do so in order to foster collective identity, or a shared sense of "we-ness" (Polletta and Jasper 2001; Snow and Corrigall-Brown 2015; and Chapter 24 by Cristina Flesher Fominaya, in this volume, on collective identity). Cultivating a collective identity is critical to movements because it predicts member engagement in organizations and helps ensure movement continuity over time (Corrigall-Brown 2011; Hunt and Benford 1994; Klandermans 1997). Mass media have long played a role in collective identity formation. Music, film, books, theater, and poetry can be used to foster a sense of solidarity and collective identity among individuals who share a set of grievances or concerns (Bogad 2016; Eyerman and Jamison 1998; Roy 2010). For example, ex-mill workers wrote anthems of protest. Songs such as Dave McCarn's (1930) "Cotton Mill Colic" sold thousands of copies and were later sung

by striking workers across the USA (Roscigno and Danaher 2004). Likewise, books, film, poetry, and online forums have been used to cultivate identities around causes as diverse as labor rights (Isaac 2012), animal rights (Jasper 1997), gay rights (Nip 2004), women's rights (Crossley 2015), and environmental justice (Reed 2005).

Activists across the ideological spectrum use mass media to cultivate collective identity. In fact, online forums may be particularly important for groups that express identities that are not regarded as socially acceptable or that engage in violent activities. Scholars, for instance, find that movement actors have been able to sustain and grow the White Supremacy movement by cultivating collective identity via ICTs (Blee 2002). Online forums such as Stormfront allow supporters to conceal their real-world identities and express their ideology and opinions without censorship (Futrell and Simi 2004; Hier 2000). Additionally, these online forums have both public and "member-only" spaces. This is important because the former allows White Supremacists to maintain a less stigmatized public identity for their regular face-to-face interactions, which can help the movement attract new members (Adams and Roscigno 2005; Caren, Gaby, and Bond 2012), while the latter creates a "free space" for authentic identity expression and action (Douglas et al. 2005).

More obstacles than risks

Movement actors who use legal tactics to affect change face few risks of repression in open media systems. However, that does not mean activists get media attention at will, particularly from mainstream outlets. Much of the literature on movements and media focuses on the obstacles activists face in their attempts to use mainstream media to frame debates and mobilize individuals to action, particularly within the US context. News venues, for instance, have limited "carrying capacities" (Hilgartner and Bosk 1988), which means movements compete with other groups and events for attention. Likewise, journalists do not need activists to comment on their issues and events. They can always ask institutional actors such as politicians, scientists, academics, and law enforcement officers to summarize and interpret movement events and campaigns for the broader public, which may cast movement claims in a negative light (Gamson and Wolfsfeld 1993; Meyer and Gamson 1995). In short, competition for news space and "standing," or voice (Ferree et al. 2002), is a key obstacle that movement actors face in their efforts to frame debates and mobilize outside of sympathetic audiences.

Bias is another obstacle activists face in open media systems. Scholars have identified a number of factors, including the issue, the size of the event, the time of day the event is held, whether the event is staged near a power center, the presence of opponents, and the outbreak of violence that affect whether or not an event is selected for inclusion in the news (McCarthy, McPhail, and Smith 1996; Mueller 1997; Myers and Schaefer Caniglia 2004; Oliver and Myers 1999; Smith et al. 2001). And, when events are covered, there is a wide body of research that illustrates that news media tends to accent the most emotive, violent, and extreme elements of the event (Smith et al. 2001; Sobieraj 2011), thus creating an "illusion of homogeneity" (Turner and Killian 1987). Consequently, activists and their causes often are marginalized in news coverage.

There are risks associated with negative media attention. Movements that are marginalized in mainstream media coverage may experience a loss of public and political support, which makes it more difficult for activists to forward their goals and, in some cases, maintain functioning organizations (Gitlin 1980). Likewise, activists using disruptive or dramatic tactics may find that mass media coverage brings unwanted attention from the state. Even in relatively open media systems, the state may take actions against movements that they regard as a threat to the status quo. The US government, for example, monitored movement communications and used covert methods to disrupt Students for a Democratic Society (SDS) and the Black Panthers in the 1960s and early 1970s (Cunningham 2004; Davenport 2009). In the digital age, activists looking to connect with a broader public may find it difficult to do so if their causes do not fit the guidelines of corporatized social media. Facebook, for instance, continues to come under fire for censoring breast-feeding activist pages under the auspices of indecency while allowing white supremacists to organize without interruption. Trolls also are a risk in the contemporary media environment (Binns 2012). Activists who take their issues online may find that their conversations attract individuals who simply want to disrupt their communication for their own entertainment (Herring et al. 2002).

Engaging from the Shadows: Strategic Media Choices in Closed Systems

In countries where the media system is relatively closed to challengers, using media for political purposes can be quite difficult. This is because the state either owns or controls the media outlets that reach broad swaths of the citizenry and uses its authority to censor challenging ideas and/or determine the flow and content of information. Chinese media, for instance, is largely state-run, and the General Administration of Press and Publication and the State Administration of Radio, Film, and Television monitor media outlets. ICTs, including social media sites, are also under close supervision by state officials. In fact, the Chinese government tries to control citizens' access to information through firewalls (aka "The Great Firewall of China"), which blocks access to certain websites. Journalistic practices in relatively closed systems reinforce state control, making it difficult for activists to get their claims to a broader audience. And, journalists working in relatively closed systems are far more likely to engage in self-censorship, which make it even more difficult for activists to get their ideas to a broader public (Lauk 2009; Whitten-Woodring 2009; Whitten-Woodring and James 2012). As a result, activists in closed systems have limited strategic options because they often must operate below the radar of the state or risk repression (Dong, Kriesi, and Kubler 2015; King, Pan, and Roberts 2013).

In closed media systems, the distinctions between the targets of communication (external audiences and internal and sympathetic publics) are particularly blurred. This is because activists use mass media for consciousness-raising, social analysis, and as a catalyst to political action and social transformation simultaneously. This changes how media are employed to cultivate a collective identity. Sometimes the aim of a film, story, poem, or piece of art is to crystalize a collective identity, often in direct opposition to those with power (Burton 1978; Martin 1997a, 1997b). For

example, before the junta of Brazil restricted artistic expression in 1968, filmmakers used the medium to expose the connections among those in the country's ruling class, cultivate dissent, and create a new, more inclusive national identity. After the passage of the junta's Institutional Act Number Five, "obfuscation, double entendre, smoke screening, outlandish and circumvoluted satire" (Burton 1978: 54) were the only way filmmakers could get their political messages past the censors.

The production of media can lead to the formation of a collective identity. During the Pinochet regime, for instance, Chilean women secretly gathered in churches and in homes to make *arpilleras* (small tapestries) documenting the atrocities taking place within the country including the "disappearances" of their husbands and sons. Gathering together in secret to create *arpilleras* provided women a space and medium through which to share their stories and create a narrative of resistance. In this way, the creation of *arpilleras* was important as a goal in and of itself, allowing women to cultivate a shared identity (Moya-Raggio 1984).

International audiences are important external targets in closed media systems. Movement actors who can use mass media to bring international scrutiny to a political problem can create an opportunity to effect political change (Gamson and Meyer 1996; Keck and Sikkink 1998). Getting the attention of international audiences has been made somewhat easier in the digital age. Activists can use websites, discussion boards, email, and social media to expose political problems to a global audience. In Chiapas, Mexico activists associated with the Zapistista movement famously used discussion boards to communicate with journalists and bring their struggles to an international audience (Langman 2005; Rich 1997; Schulz 1998). More recently, activists in Egypt and Tunisia used mobile phones and social media to organize protests, report events, and offer commentary designed to build momentum for democratic change within the countries and attract the attention of the world.

It is important to note that the level of restriction varies across closed media systems. For example, activists operating in Libya, where the government had substantial control over the Internet, and Syria, where governmental officials monitor online communication, had a more difficult time using ICTs, including social media, to their advantage since the states quickly cracked down on communication (Amar and Prashad 2013; Khondker 2011). These cases can be compared to Egypt, which, prior to the Arab Spring, promoted Internet usage among its citizens. By the time the Egyptian government shut down the Internet in January 2011, activists had long established ties online in social media forums such as Facebook and had found other ways to communicate and organize (Cottle 2011; Khamis 2011; Lim 2012). In short, the political outcomes of Arab Spring movements differed, in part, because the media systems, and the resulting strategic options available to activists, varied by country.

More risks than obstacles

The level of restriction in a media system is related to activists' risk of repression. Activists take great risks when they use media to directly challenge elites. They sometimes take these risks in an attempt to frame a debate and draw international media attention to an issue. The Russian punk group Pussy Riot, for instance, protested the "dictatorship" of Russian President Vladimir Putin and his close relationship with

the Russian Orthodox Church. Pussy Riot staged unauthorized performances in public spaces, including Moscow's Cathedral of Christ the Savior, and posted them online for the world to view. Three of the group members were arrested, denied bail, and eventually convicted of hooliganism motivated by religious hatred. The trial and sentence sparked international criticism and, months later, the women were released from prison. The band members were credited with bringing international attention to Putin's opposition to gay rights and for reinvigorating feminism in Russia (Gessen 2014).

Even in closed media systems, activists can use media to mobilize public opinion and force the government to act. In China, chat rooms, news groups, and bulletin boards are popular places where activists can carefully question state practices and policies, and sometimes even effect change. For example, the local government covered up a tin mine explosion in Nandan, Guangxi Province, for almost two weeks despite the fact that it had killed 81 people. Once news of the explosion appeared on Internet bulletin boards, a few activists began to ask questions about the incident. A journalist from the state-run *People's Daily* was dispatched to investigate and posted a brief news report regarding the "mysterious" explosion. The report attracted wide attention with tens of thousands of people commenting on the event. Days later, the Chinese Premiere ordered an investigation into the explosion (Yang and Calhoun 2008). Of course, engaging in this type of polite protest is not without risk. Chinese activists who use ICTs to question the state still risk arrest and prosecution for their actions (Yang 2003; Yang and Calhoun 2008).

Conclusion

Activists make choices about how they use media and to what ends. However, they are not free to make these choices without constraint. We identify two key dimensions that shape how activists make these strategic decisions: (1) the target of activist communication; and (2) the relative openness of the media system. By examining these two dimensions, we are able to move beyond simply focusing on types of outlets (traditional outlets or ICTs and social media) as well as media outcomes to understand how activists use media for different goals across political contexts. This framework underscores that conventional media (such as mainstream news), commercial media (such as books and music), and social media (such as Facebook and Twitter) are all shaped by state mandates and, consequently, affect how activists use them in their political projects. Drawing from the existing literature on social movements and mass media, we highlight the utility of this approach and illustrate the obstacles and risks associated with different choices across media systems.

Given the continued evolution of mass media, the movement-media relationship is ripe for research. The rise of social media, for instance, may have important implications for organizations and movement messages. At the organizational level, scholars should consider if social media help organizations to grow or if these social connections online make survival in an increasingly crowded movement environment more difficult. More importantly, scholars need to examine how social media affect individual participation and individual understandings of political change.

At the level of messages, social media may fundamentally change the nature of movement frames and their use in mobilization processes. Social media platforms with character limits encourage less elaborated frames and, possibly, more experimentation with messaging as activists try to keep their ideas trending. Moreover, efforts to keep trending may be helped (or hindered) by the commercial imperatives of popular platforms like Facebook, which actively censor content.

The media-movement relationship is particularly ripe for investigation in closed media systems. Much of the scholarship focuses on open systems and, consequently, much less is known about the strategic choices of activists in closed systems where media are less responsive to (or more repressive of) activists' messages and campaigns. Scholars could examine the conditions that lead to increased (and decreased) repression of activists who use media to challenge elite positions, how knowledge of backdoors to the Internet shape activism, and whether differential access to social media reinforces some types of claims at the expense of others. Scholars also should analyze how international programs, such as those designed to bring ICTs to the developing world, lend themselves to fostering activism in closed media systems. More generally, future research should delineate the dynamic relationships among movements, media, the state, and the public by examining how changing political contexts shape the strategic choices available to activists. Analyzing systems that are becoming more open (or are closing), will allow scholars to assess how activists alter their tactics in response to changing conditions.

Note

1 Communication scholars debate the relationship between the state, citizenry, and mass media in detail. See, for example, the model outlined by Hallin and Mancini (2004) and subsequent debate over its utility (Hallin and Mancini 2012). Communication scholars also consider the influence of media ownership on content (Gans 2003). While these discussions are relevant, they are beyond the scope of the current review.

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19

Nonviolent and Violent Trajectories in Social Movements

Kurt Schock and Chares Demetriou

Introduction[1]

Violent and nonviolent resistance are analyzed by scholars of social movements as well as by scholars in other disciplines and sub-disciplines who study civil resistance, political violence, international security, and conflict resolution. However, there is relatively little recognition of each other's research. Our aim is to identify main lines of research across disciplinary divides with regard to: (1) processes of radicalization, whereby nonviolent contention becomes violent; (2) processes of demilitarization, whereby there is a decisive strategy shift from armed to unarmed contention; and (3) the impact of armed actors on the likelihood of success of unarmed actors in contemporaneous struggles.

We recognize that although observers may make distinctions between violent and nonviolent action, participants in struggles do not necessarily make these distinctions. We also recognize that a mix of violent and nonviolent action is often implemented in highly charged struggles. We regard violent resistance as threatened or actual use of arms or physical force to produce bodily harm or death to opponents, bystanders, and in some cases the general public, and we regard nonviolent resistance as overt unarmed methods of protest waged outside routine and institutional political channels.[2] However, we also recognize that distinctions between violent and nonviolent action are often fuzzy. For example, there are unarmed acts that are not nonviolent, such as the destruction of property and physical altercations between opposing parties. We recognize that actual violence against the state, the threat of violence against the state, and nonviolent contention all exist under the long shadow of state coercion and violence; and we recognize that in some instances nonviolent action may be implemented to provoke the intervention of the state, an institution based on violence. We also recognize that strategies and actions may have expressive as well as strategic motivations. Expressive considerations "are those involving the gratifications that come with the exercise and display of power" and strategic

The Wiley Blackwell Companion to Social Movements, Second Edition. Edited by David A. Snow, Sarah A. Soule, Hanspeter Kriesi, and Holly J. McCammon.
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considerations "are those having to do with the judgment of which strategy is likely to contribute toward the attainment of the movement goals" (Turner 1970: 154).

A fundamental analytical distinction between various approaches to strategy concerns the assumption about the degree to which actors have choice. That is, do actors have complete knowledge of various forms of resistance and make instrumental calculations in their selection of strategies and actions? Or is choice of strategy and actions severely constrained or entirely absent due to incomplete information, group dynamics, or structural or cultural context? Civil resistance and security theories, and some social movement literature based on rational choice assumptions tend to emphasize strategic choice, whereas more structural theories of social movements and revolution tend to emphasize the determining impact of context through the elimination of choice. A problem cutting through both approaches is the assumption of coherent actors – an untenable assumption in many instances.

At the extremes, context may determine strategy. For example, unarmed resistance may be the only option in a totalitarian regime where the state monopolizes arms and security forces are cohesive; and armed violence may be necessary in self-defense to prevent a group from being completely exterminated through violence. In most contexts, however, there is some degree of latitude available to challengers – which may vary from minimal to maximum choice – and the choices made are shaped by culture, history, and learning. In his analysis of democratizing Britain and France in the eighteenth and nineteenth centuries, Tilly (1986, 1995) identified repertoires of contention that tended to characterize specific times, places, and conflict dyads. He defined contentious repertoires as:

> a limited set of routines that are learned, shared, and acted out through a relatively deliberate process of choice. Repertoires are learned cultural creations, but they do not descend from abstract philosophy or take shape as a result of political propaganda; they emerge from struggle. People learn to break windows in protest, attack pilloried prisoners, tear down dishonored houses, stage public marches, petition, hold formal meetings, organize special-interest associations. At any particular point in history, however, they learn only a rather small number of alternative ways to act collectively.
>
> (1986: 42)

At the extremes, *no repertoires* exist when previous strategies and actions have no impact on subsequent strategies and actions; and *rigid repertoires* exist when strategies and actions persist despite changes in context, reactions of opponents, and likelihood of success. Tilly argued that *strong repertoires* are most common. That is, the choice of protest methods is relatively limited and results from interactions between challengers and authorities over time as well as the broader structural context in which these interactions occur, with regime type and state capacity being most important (Tilly 2006, 2008).

Although we concur with Tilly that strong repertoires are most common, we are concerned here with *strategy shift*, i.e. a decisive change in the predominant forms of action by challengers engaged in struggle, such as from nonviolent to violent resistance (e.g. radicalization) or vice versa (e.g. demilitarization). Mechanisms that contribute to radicalization and demilitarization in a variety of contexts are identified in the following two sections. In the third section we examine potential consequences of contemporaneous armed resistance for groups engaged in unarmed struggle.

Radicalization: Towards Strategies and Methods of Violent Contention

The adoption by non-state actors of strategies of violent contention is often termed radicalization. Although we adhere to this terminology, we recognize that coupling the term radicalization to violence is not always accepted in the literature. Some authors, rather, define radicalization as the deployment of tactics of contention that are high risk or illegal but not necessarily violent (Cross and Snow 2011; Moskalenko and McCauley 2009), while other authors do not define radicalization through the tactics of contention at all; among the latter, are conceptualizations of radicalization based on ideology or extent of change sought (Demetriou 2012; Juergensmeyer 2005; Sprinzak 1998). Explanations of the use of strategies or methods of violence by non-state actors vary according to the specific phenomena to be explained, on the one hand, and to the explanatory logic, on the other. The focus of explanation and the logic of explanation often interrelate, as, for example, when aggregate phenomena across episodes are explained by macro-level factors; but in principle the focus and the logic of explanation are distinct from each other, and many analysts heed the distinction. Below, while some disciplinary distinctions are drawn, the guiding distinctions are epistemological and cut across disciplines. One of these distinctions regards the type of inquiries on political violence, particularly whether "why" or "how" questions are posed. Another distinction regards the level of analysis and explanation, particularly whether it is the macro-, meso-, or micro-level. Of course, these distinctions are not firm in the literature, with many works traversing them; they are taken here as mapping guidelines.

At the macro-level, studies typically ask why political violence occurs, without being particularly concerned about how strategies of violence develop. They seek to identify root causes or permissive factors setting the stage for political violence. But the "violence-prone stage" is often taken to concern the group or population from which militants emerge. This is the case most particularly in the security studies literature, which is interested in developing predictors for the emergence of violence as well as explanations for past violence. Accordingly, this literature often makes reference to "groups at risk" and employs environmental conditions to explain or identify groups' violence-prone attributes and other relevant dispositional characteristics (Gurr 2000; Piazza 2006; Stern 2003). Thus, for example, factors regarding the international political system may explain dominated and therefore indignant populations; ideology and political culture may explain revolutionary goals and therefore belligerent populations; socio-economic factors may explain economic deprivation and therefore populations with grievances; and so on. Of course, combinations or interactions of different sorts of environmental factors can enter the analysis, such as the interaction of inequalities and political opportunities (Schock 1996).

It is worth adding that analyses at the aggregate level are often forced to conceptualize with broad strokes, which has repercussions for theory building. More specifically, how to operationalize violence as the dependent variable is both crucial and contested. While an inclusive conceptualization and operationalization add cases and confidence in the analysis, some scholars are uneasy at grouping together phenomena that, to them, do not belong together. Perhaps nowhere is this uneasiness and tension more palpable than when the concept of terrorism is involved. This is an exceptionally stretched concept, as over one hundred different definitions of terrorism

are in use (Schmid and Jongman 1988; Weinberg, Pedahzur, and Hirsch-Hoefler 2004). Given this, the concept may denote a range of different phenomena. Based on their preferred definition, some scholars argue that the strategy of terror is *sui generis* and must therefore not be considered akin to other strategies of violence, such as those aiming at military or material targets. Bergesen (2007), for example, who effectively holds terrorism to be the exercise of categorical violence, maintains that the willingness to harm civilians implies a disconnect between perpetrator and victim that must be treated as foundational in research. By contrast, Tilly (2004, 2005), while recognizing the existence of strategies of terror, argues that the factors precipitating them are not exclusive, and so the study of this strategy must not be divorced from the study of other strategies of violence or even strategies of transgressive but nonviolent contention.

Studies at the micro-level, too, tend to focus on "why" questions (Lichbach 1995; Moghaddam 2005; Pape 2005), seeking to explain motivations of those participating in political violence. The identified motivations may vary, ranging from ones relating to grievances and other material conditions to ones relating to emotions, such as hatred or resentment of the opponent, sense of belongingness with a militant group, and a search for identity. Micro-level works connected to social psychology may treat political violence as psychopathology, but this is not true of all micro-level works. Most particularly, those stemming from security studies often operate on rational choice theory presuppositions, in which case the motivation of greed as well as rationality are employed to account for individuals' trajectories towards militancy and violence – trajectories often referred to as "radicalization." The tendency is to use statistical or qualitative methods, including interviewing, in order to extrapolate the "mindset" of militants.

However, there is also a line of micro-level works that leaves the window open for "how" questions. These works focus on the reconstruction of individuals' pathways to radicalization (Bosi and della Porta 2012; McCauley and Moskalenko 2011; Viterna 2013). As they examine life trajectories, these works produce predominantly "how accounts" – accounts of how individuals take turns in their lives down the path to violent activism. Often these works – and especially those stemming from the social movement studies tradition – follow constructivist epistemologies, building on activists' own narratives. For example, studying the recruitment of women into the guerrilla insurgency in El Salvador, Viterna (2013) develops accounts of micro-level mobilization. Using hundreds of interviews and combining constructivist and relational sociology, she delineates various paths to mobilization and to the advancing engagement with activism, violence, and the guerillas' quotidian activities – most notably romance and reproduction. Furthermore, taking up the issue conceptually, Cross and Snow (2011) argue that individuals' pathways to radicalism – here taken to mean the adoption of direct and high risk action which may not necessarily be violent – vary depending on whether or not the activists believe they are persecuted by the state and whether or not they are trusted by their grassroots peers. Four types of radicals emerge from this account, one of them being the "militant radical." It is this type of radical, trusted by peers and seemingly persecuted by the state who most typically adopts violence.

The analysis by Cross and Snow bridges the micro- and meso-levels. But other pertinent studies exist firmly at the meso-level. In fact, this is the level of analysis

championed most particularly by the many social movement studies emphasizing organizational factors. These are not uniform studies, of course, but it is fair to suggest that in general they focus on "how" questions in addition to, or in lieu of "why" questions. Accordingly, they consider strategies of violence to be gradual and interactive developments, which must then be explained in terms of social interaction. When they bring root causes or other underlying factors in the analysis – as they often do via ideologies and cultural templates – they still keep the focus on the interactions that activate those causes and factors. After all, these studies start from the assumption that social movements develop strategies of violence typically after they have pursued strategies of nonviolent contention;[3] from this perspective, an exclusive focus on root causes is inadequate, since the same causes would be invoked to explain both the nonviolent and the violent phase of social movements.

A branch of such meso-level studies follows what may be labeled the strategic interaction approach, which includes works from both security studies and social movement studies (Brym and Bader 2006; Crenshaw 1995; Weinstein 2006). The disciplinary distinction produces differences in preferred concepts and theories as well as a tacit division of labor. Works in the social movement studies tradition tend to focus on the emergence and persistence of violence, while works in the security studies tradition tend to focus on the "escalation" of violence after its onset; among the works in the latter line – studying how authorities and the challengers end up outbidding each other – one often finds rational actor or game-theory explanations of strategy. In general, however, the two lines converge in using units of analysis that tend to be discrete and pre-given, such as individuals or groups. Weinstein (2006), for example, through a comparison of several historical instances of insurgency, identifies three broad rebel group strategies, one leaning toward governance, the second toward violence, and the third toward resilience. Combining strategic interaction with the analysis of environmental conditions, his approach holds mobilization into the insurgency to be crucial and shaped by factors that raise or lower the barriers to insurgency organization. In general, he argues, resource-rich environments create strategies and pathways pursuing high levels of indiscriminate violence, while resource-poor environments are conducive to more selective violence.

A second branch of meso-level studies evolved from the "political process" approach in the study of social movements (see Chapter 1 by McAdam and Tarrow, in this volume). Its key characteristics are the comprehensive analysis of the context of strategizing and the analysis of strategizing as a dynamic and contingent phenomenon emerging out of that context. So, while many studies related to approaches reviewed above tend to focus on the violent group or its immediate milieu, this approach examines various environmental and organizational factors and explains turns toward violence based on those factors. Thus, for example, the turn to violence by groups that splinter from other groups – a recurring pattern in the development of strategies of violence – is explained not only by the dynamics regarding the groups in question but also by broader dynamics in their environment (e.g. Pearlman 2011).

Furthermore, the work of McAdam, Tarrow, and Tilly (2001) in particular, argues for a mechanism-based epistemology and explains emergent dynamics in terms of social, cognitive, and environmental mechanisms – though the explicit use of mechanisms is not universal in this branch of studies. This approach generally heeds the

demarcation of "contentious politics" as wide-ranging but comparable forms of activism, including activism that employs strategies of violence and activism that does not. At the same time, it must be added that the comparison of violent to nonviolent strategies of contention has yet to build up steam in the related scholarship, despite the fact that Tilly and Tarrow (2015) discuss together violent and nonviolent activism, showing, for example, similar patterns of mobilization in nonviolent social movements and lethal conflicts.

della Porta (2013) is an exemplar of this branch of meso-level studies. She employs the concept of mechanism to capture the dynamism in phenomena of violent activism, but she does not cover the whole range of contentious politics. She is concerned only with "clandestine political violence," i.e. phenomena of political violence in which the perpetrators act from underground and therefore are organized in relatively small groups with limited military capacity and little or no control of territory. She identifies seven main mechanisms accounting for the emergence of clandestine political violence. Three of these mechanisms work to produce processes of polarization: "escalating protest policing," "competitive escalation during process cycles," and "activation of militant networks." Another three mechanisms contribute more particularly to the development of the clandestine organizations: "organizational compartmentalization," "action militarization," and "ideological encapsulation." The seventh mechanism, pertaining to the groups' later-stage reconfiguration, is labeled "militant enclosure." While della Porta's focus is not on strategizing per se, she makes important contributions in the analysis of the contexts in which strategizing takes place.

Alimi, Demetriou, and Bosi (2015), working in the same tradition at the meso-level, pay closer attention to strategizing. They seek to analyze the emergence of strategies of violence by social movement organizations (a process they call "radicalization") out of five arenas of interaction: (1) the arena between the movement and its political environment; (2) the arena between the movement and the state security forces; (3) the intra-movement arena; (4) the arena between the movement and a counter-movement; and (5) the arena between the movement and its constituencies. In these arenas, they argue, there tend to operate five respective mechanisms conducive to radicalization: (1) "upward spirals of political opportunities and threats"; (2) "outbidding"; (3) "competition for power"; (4) "object shift;" and (5) "dissociation." They maintain that these mechanisms (the first three more than the last two) recur in a wide range of episodes of radicalization, from those featuring social movements where only fringe organizations turned to violence, to those (such as many ethno-nationalist ones) where violence is embraced by most of the movement, to transnational ones featuring organizational spread and pluralism. But they also expect that these mechanisms have roles in the production of radicalization that differ across episodes. For example, they find that the mechanism "outbidding" – referring to the action-counteraction dynamics between social movement organizations, on the one hand, and the state security forces, on the other, that raise the stakes for the two sides – had a particularly important role in the early stage of both the radicalization of the Red Brigades, connected to the Extra-Parliamentary Left movement in the 1960s and 1970s Italy, and the radicalization of al-Qaeda, connected to the Salafi Transnational Jihad movement. By contrast, it had a lesser role in the later stage of these radicalization processes, despite increases in violence; in those later

stages, rather, the mechanism of "upward spirals of political opportunities" gained particular salience in the Red Brigades episode, and the mechanism "competition for power" in the al-Qaeda episode (ibid.: 187–192). The authors expect, too, that the five mechanisms they identify are constituted by sub-mechanisms differentially. Thus, for example, in the episode of the Red Brigades, "outbidding" was constituted principally by the sub-mechanisms "provocation," "repression by proxy," and "de-legitimization," whereas in the episode of al-Qaeda, it was constituted principally by the sub-mechanisms "boundary control" and "threat attribution" (ibid.: 175–182). Through analysis of mechanism emergence and interaction, therefore, the authors purport to explain strategic choices about not only the resort to violence but also its progression, including the type of violence pursued.[4]

In short, explanations of the shift to violent contention vary according to the level of analysis and to whether "why" or "how" questions are posed. As a result of this plurality of explanations there has been little academic agreement on how to delineate and typify the various strategies pursued. While the contours of these strategies, and of the various repertoires of contention more broadly, are known to academics, just as activists know them, the details of these strategies and repertoires have not been put under systematic academic scrutiny and so authoritative generalizations about them have yet to be produced. Turner's observations decades ago still sound preliminary: one could therefore adopt his classification of strategies of contention as persuasion, bargaining, and coercion; and one could accept with him that coercive strategies – aiming to manipulate those with the power to make decisions into making decisions they dislike – are particularly, but not necessarily, prone to the adoption of violent means of contention, but one would still have difficulty making fine distinctions among coercive strategies (Turner 1970). The problem is that "what is explained" – in this case, the adoption and development of strategies of violence – cannot be divorced from the explanation.

Demilitarization: From Armed to Unarmed Strategies and Methods

As discussed above, processes of conflict escalation and radicalization have received substantial attention by scholars of social movements and security. Similarly, processes of conflict "de-escalation" and "resolution," such as individual disengagement from terrorist groups (e.g. Horgan 2009) and collective shifts from armed resistance to negotiation, demobilization, or institutional politics (e.g. Zartman 1996) have received substantial attention in the security and conflict resolution literatures. However, decisive strategy shifts from violent to nonviolent resistance have received scant scholarly attention. This is due in part to a common assumption in the social movement literature that nonviolent resistance is situated on an ordinal continuum between conventional politics and violence and that there is a natural escalation from nonviolent to violent resistance when nonviolent action is repressed or deemed ineffective (Schock 2013, 2015). Nevertheless, nonviolent resistance may be a powerful method of struggle in repressive contexts and may even succeed where violence has failed (Chenoweth and Stephan 2011; Nepstad 2011; Schock 2005).[5] Moreover security studies, based on realist assumptions, often glorify the power of

violence and dismiss the power of nonviolent resistance; and conflict resolution studies are often merely concerned with cessation of armed conflict, i.e. the attainment of "negative peace."

Dudouet (2013, 2015) and her collaborators have done the most systematic work on demilitarization, i.e. a decisive strategy shift from armed to unarmed contention. They incorporate a mechanism-based epistemology and identify factors at the micro- (leadership) and meso-levels (interrelations between movements and constituents or other parties) that contribute to shifts from predominantly armed to predominantly unarmed strategies in resistance and liberation movements.

At the micro-level, changes in leadership may contribute to demilitarization. This may occur through a generational change in leadership whereby a younger cohort of leaders prefers unarmed over armed resistance. Generational leadership change contributed to a shift from armed to unarmed resistance in the Western Saharan national liberation movement in recent years. The belief system of leaders may also change, which occurred in the Egyptian *Jama'a Islamiya* movement in 1997 as a result of the reinterpretation of doctrinal texts by Islamist scholars leading the movement. Movement leadership may also shift strategy as a result of cost-benefit analysis, which contributed to a shift from guerrilla resistance to unarmed struggle by Maoists in Nepal in 2006 (Dudouet 2013, 2015).

Meso-level organizational factors, such as pressure from a movement's constituency or from within a movement's organizational structure may contribute to demilitarization. Leaders of the violent Egyptian *Jama'a Islamiya* movement, for example, felt responsibility toward their supporters who were subject to mass imprisonment and torture, which contributed to its demilitarization. Similarly, the Zapatista movement in Mexico, which originally engaged in armed action, subsequently shifted to unarmed methods of struggle due to preferences of many of its indigenous constituents who opposed armed struggle (Dudouet 2013, 2015).

Meso-level inter-group and contextual factors may also contribute to demilitarization. Armed challengers often operate in societies composed of multiple civil society actors who cooperate or compete with each other in their attempt to influence or topple the state. In such contexts, demilitarization mechanisms may include reverse outbidding, emulation, and coalition building. Similar to what occurs during processes of radicalization whereby groups competing for support and resources radicalize their goals and strategies in an attempt to "outbid" each other (Alimi, Demetriou, and Bosi 2015; Bloom 2004), a "reverse outbidding" process may occur whereby armed actors shift to unarmed methods and strategies to differentiate themselves from armed actors in order to broaden their domestic or international legitimacy and support. Emulation occurs when groups adopt strategies or tactics that have been effectively implemented by others (McAdam, Tarrow, and Tilly 2001). Effective nonviolent resistance implemented by grassroots Palestinian groups along the separation wall in the West Bank, for example, convinced the leadership of *Fatah* to embrace nonviolent resistance in a more systematic manner. The desire to build coalitions may also contribute to demilitarization. The ETA, part of the Basque independence movement, for example, realized that a shift to nonviolent resistance would contribute to broad-based coalition building across Basque political groups (Dudouet 2013, 2015).

In their work on processes of radicalization, Alimi, Demetriou, and Bosi (2015) maintain that such processes entail potentials for demilitarization as well. According

to their analytical framework, this can happen when any or all of the mechanisms that they hold to be conducive to radicalization cease to operate. Indeed, it can happen more decisively when any or all of these mechanisms reverse. Such reverse mechanisms are made up of operations conducive to nonviolent activism and can be thought as mirror images of the identified radicalization-conducive mechanisms. Thus "underbidding" in the arena between the movement and the state security forces is the reverse of "outbidding," "downward spirals of political opportunities" in the arena between the movement and its political environment are the reverse of "upwards spirals of political opportunities," "consensus mobilization" in the intra-movement arena is the reverse of "competition for power," and so on.

Other scholars of political violence have proposed a "substitution model" of conflict that is also cast at the meso-level and focuses on interactions between challengers and authorities. The substitution model maintains that challengers rationally choose between nonviolent and violent strategies and tactics and shift away from methods that are repressed by authorities (Lichbach 1987; Moore 1998). When armed resistance is ineffective in the face of repression, challengers shift to unarmed methods. With regard to the civil rights struggle in Northern Ireland from 1963 to 1976, for example, Cunningham and Beaulieu (2010) argue that the consistent use of repression against violent action promoted shifts to nonviolent action. Inconsistent responses by authorities are hypothesized to encourage further violent action.

The causal chain between macro-level factors and demilitarization is longer and more complex, however, a number of factors can be considered that may be conducive to strategy shifts to nonviolent resistance in recent decades. These include an increasing disparity in the means of violence between civilians and the state in most contexts, development of effective state counter-insurgency techniques, an increasing global concern with human rights, advances in information and communication technologies that publicize human rights violations and promote transnational networking among civil society groups, cross-national diffusion of methods of nonviolent action, cross-national transfer of generic knowledge about nonviolent resistance, an increasing recognition of the effectiveness of nonviolent resistance, and a recognition of the relationship between means and ends (Schock 2005, 2015). In an examination of maximalist challenges that were predominantly armed or unarmed, Chenoweth and Stephan (2011) found that the likelihood of unarmed maximalist challenges became more frequent and more effective as the twentieth century progressed.

Interaction of Violent and Nonviolent Contention

Scholars of radicalization and demilitarization address the questions "How and/or why is there a decisive shift between violent and nonviolent strategies and actions during episodes of contention?" A related question is "What are the consequences for nonviolent struggle when some challenging groups call for or implement violent resistance?" The dynamics and outcomes of the interaction of violent and nonviolent contention among challengers in contemporaneous struggles are complex and understudied.

Scholars of social movements in democratic contexts have *partially* addressed this question through the study of "radical flank" effects. A *positive radical flank* effect

occurs when the leverage of moderate challengers is strengthened by the presence of radical challengers. A *negative radical flank* effect occurs when the activities of a radical wing weaken the leverage of moderates (Haines 1988). In the social movement literature, the most common criteria used to differentiate "moderates" and "radicals" are methods of action, extent of change sought, ideology, rhetoric, and compromising stance. The call for or use of violence is considered to be more radical than nonviolent action; revolutionary demands are considered to be more radical than reformist demands; and violent rhetoric, exclusive ideology, and an uncompromising stance are considered to be more radical than rhetoric that is not violent, ideologies that are inclusive, and the willingness to compromise.

Concerning positive radical flank mechanisms, radicals (including violent actors) may make moderate challengers (including nonviolent actors) seem less threatening to elite interests, contribute to public or third party support for moderates, or create a political crisis that is resolved in favor of the moderates (Anner 2009; Braithwaite 2013, 2014; Haines 1988; Jenkins and Eckert 1986; Koopmans 1995; McCammon, Bergner, and Arch 2015). The diffusion of oppositional culture from radical to moderate actors may facilitate nonviolent mobilization of the latter (Isaac, McDonald, and Lukasik 2006). Some have argued that limited uses of armed violence (e.g. for self-defense) by some groups have protected activists from worsening regime or communal violence (Cobb 2014; Wendt 2010), therefore increasing the likelihood of a successful nonviolent challenge.

Concerning negative radical flank mechanisms, radicals (including violent actors) discredit all regime opponents (whether violent or nonviolent) (Haines 1988; Sharp 1973), provoke widespread repression against all challengers (Barrell 1993; Pearlman 2011), reduce popular participation in unarmed campaigns (Chenoweth and Stephan 2011; Chenoweth and Schock 2015), and alienate potential third-party supporters thereby decreasing the possibility that repression backfires (Martin 2015; Wasow 2015).

Scholars of US social movements, while recognizing that radical flank effects may be positive or negative, almost always identify positive radical flank effects. For the US civil rights movement, scholars maintain that the emergence of militant Black Power activists helped increase the public's acceptance of methods of nonviolent action and integrationist goals supported by Martin Luther King, Jr. and the Southern Christian Leadership Conference (Killian 1972; Oberschall 1973: 230) and that the more militant ideology of Black Power and the outbreak of urban riots resulted in increased support and funding for moderate civil rights organizations (Haines 1988; Jenkins and Eckert 1986).

Furthermore, Freeman (1975) found evidence for a positive radical flank effect in the US women's rights movement, maintaining that radical women's groups such as lesbian and socialist feminists increased the bargaining power of mainstream reform organizations such as the National Organization for Women. McCammon, Bergner, and Arch (2015) found that conflict within the Texas women's movement generated a positive radical flank effect by allowing moderate factions to publicly distance themselves from radicals, thereby creating opportunities to appeal to political elites in ways that helped moderates achieve their goals. Similarly, only after the mobilization of more radical socialist labor organizations in the early twentieth century did US labor movement demands for collective bargaining and an eight-hour workday

became negotiable issues (Ramirez 1978; Rayback 1966). For the pro-life movement, Rohlinger (2006) found that moderate organizations may benefit from the more extreme rhetoric of more ideologically rigid organizations, but when the extreme organizations use violence, the moderate ones must distance themselves in order to avoid a negative radical flank effect.

Collectively the social movement scholarship on radical flank effects is biased by a reliance on single case studies. The few studies that employ cross-sectional or longer-term longitudinal analysis find less support for a positive radical flank effect. In his study of a random sample of 53 cases from a population of challenges in the USA from 1800 to 1945, Gamson (1990) found that with regard to challenging groups pursing the same general interests, factionalism decreased the likelihood of success of challenging groups. Moreover, evaluating data from thousands of US counties in the 1960s and 1970s, Wasow (2015) demonstrated that proximity to violent protest led to higher proportions of votes for Republican candidates. Conversely, he found that higher frequencies of nonviolent protest led voters to support Democratic candidates. Similarly, at the national level, he found that higher incidences of violent protest led survey respondents to identify "law and order" as the country's greatest priority, while higher incidences of nonviolent protest led voters to identify civil rights as the most important issue.

Moreover, the existing literature often conflates short-term tactical goals (e.g. process goals) with long-term outcomes (e.g. strategic goals) (see Chenoweth and Schock 2015). Haines (1988), for example, concluded that violence had a positive overall impact on the US civil rights movement by drawing funding and support to the movement. Funding, support, and increased attention are important process goals for social movements; however, studies that evaluate the long-term political effects (e.g. Wasow 2015) suggest that radical flanks (in this case violent flanks) may have important strategic costs in terms of the campaign's ability to succeed in the long run.

More specifically, with regard to violent flank effects – rather than the much broader "radical" flanks, which may or may not include violence – the civil resistance literature advances the view that simultaneous violent challenges are likely to undermine the leverage of unarmed struggles. This literature assumes that violent and nonviolent resistance are typically antithetical and that the combination of these strategies is problematic given their diametrically opposed logics and dynamics. It is assumed that in most contexts civilians have the strategic advantage with regard to nonviolent resistance, while the strategic advantage of authorities is with violence. Once challengers take up arms against the state, then they are fighting the state where it is strongest and any restraints on repression that may have existed are removed (Sharp 1973). Moreover, the degree of participation is likely to be less in armed campaigns, as barriers to participation are higher for armed resistance compared to nonviolent resistance (Chenoweth and Stephan 2011).[6]

The civil resistance literature also suggests that under certain conditions violent suppression of unarmed protest may backfire and lead to increased support for the challengers and decreased support for authorities (Martin 2015). However, nonviolent discipline may be important requirement for backfire, since repression of violent

challengers is more likely to be perceived as legitimate by the public. In fact, states may attempt to label nonviolent challenges as "violent" or as "terrorists" or use agents provocateurs to spark violence, which enables the state to more easily justify violent repression. Thus, the optimal situation for an unarmed resistance movement, according to assumptions of the civil resistance literature, is strict adherence to nonviolent discipline by all challenging groups.[7] A major problem with maintaining nonviolent discipline, however, is the fragmentation of a challenge into competing groups with diverging goals and methods (Pearlman 2011).

In a quantitative cross-national analysis that focused on *armed* flank effects across up to 106 cases of maximalist unarmed challenges,[8] Chenoweth and Schock (2015) found no systematic evidence for the existence of positive armed flank effects across a wide variety of polities. They did, however, find evidence for an indirect negative armed flank effect whereby the existence of armed challenges decreases the level of participation and therefore the likelihood of success of unarmed challenges. However, they maintain that armed flanks may have varied impacts across a population of cases. For example, if armed flanks help an unarmed campaign to succeed in country *A* but undermine an unarmed campaign in country *B*, then the net cross-national impact might be zero. The complexity of the dynamic is revealed in the qualitative case study part of their analysis, where they found the existence of both positive and negative armed flank effect mechanisms in two of their four cases. Thus, for example, if armed flanks protect activists from state violence but also decrease the number of participants in the unarmed campaign at the same time, the simultaneous positive and negative effects might also have a net impact of zero. Clearly much more research, especially comparative and longitudinal, and analyses of data that is disaggregated from the campaign level, are needed to untangle the complexity of radical, violent and armed flank effects.

Conclusion

Much work still needs to be done to understand processes of radicalization and demilitarization, as well as the dynamics of coeval armed and unarmed challenges. For radicalization and demilitarization, meso-level approaches that identify mechanisms of strategy shift based on analyses of iterative interactions among multiple actors and the context in which these occur seem to be the most fruitful line of sociological research. An even clearer picture of strategy shift emerges when these studies are supplemented by micro-level analyses of life trajectories of activists and social psychological and within-group dynamics, as well as macro-level analyses of relevant structural and cultural changes in national and global contexts.

For dynamics of violent or armed flank effects (as well as broader radical flank effects) more comparative and longitudinal analysis and disaggregate data are needed to untangle the complexity of the phenomena. We must also examine the role of unarmed violence, such as riots on this dynamic; and we must identify various mechanisms through which positive and negative (radical, violent or armed) flank effects occur, recognize the possibility that both positive and negative flank effects may be operating within specific campaigns, and distinguish between short-term tactical goals and long-term strategic goals.

Notes

1 We thank Erica Chenoweth and David A. Snow for their comments.
2 Some take a broader view and regard property as well as people as targets of violence (e.g. Martin, McCarthy, and McPhail 2009), whereas others take a narrower view of violence as acts targeted at human bodies rather than physical objects (e.g. Keane 2004).
3 For a contrasting assumption on this point from the civil resistance literature, see Schock (2013, 2015).
4 The authors single out four types of violence, anchored on the characteristic of the victims: (1) against specific individuals (selective violence); (2) against members of a category of individuals (categorical violence); (3) against victims indiscriminately (indiscriminate violence); and (4) against victims more or less unintentionally (collateral violence). They suggest that these types are common in the literature, even though they do not amount to an exhaustive or even mutually exclusive typology (Alimi, Demetriou, and Bosi 2015: 209–217).
5 For overviews of the literature, see Nepstad (2015) and Schock (2015).
6 Of course, barriers to participation in violent campaigns may decrease under some conditions (Weinstein 2006).
7 It is also possible that under some conditions, violent repression of *violent* challengers may also backfire, however this dynamic has received less scholarly attention.
8 The number of cases varies across models in the logistic regression. Maximalist challenges have goals of regime change, liberation from foreign occupation, or secession.

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