

Resisting Information Disorder in the Global South: Identifying drivers, developing responses, evaluating strategies Proposal

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Abstract:

Despite information disorder being a widespread problem in countries in the Global South, the study of this phenomenon remains dominated by examples, case studies, and models from the Global North. A previous scoping project supported by the IDRC (Wasserman 2022) made a start to map the actors, strategies and approaches working to counter information disorder across the Global South. In its study of organisations and actors in Sub-Saharan Africa, the MENA region, Latin America and Asia, the study found that organisations working in the Global South address information disorder as a multi-levelled problem embedded in a range of social, political, and economic conditions. These conditions map onto historical experiences and wider concerns among civil society actors about the quality of communication and public sphere governance in these regions – and actors and organizations working to counter mis- and dis- information increasingly link various issues such as freedom of expression, access to digital platforms, communication rights and media literacy together in their work. For this reason, the [scoping study](#) recommended a research agenda for future work. This project is building on this research and its recommendations. It will take a more thematic approach to identify the key drivers of information disorder in the Global South, and evaluate appropriate responses and strategies, with the aim of supporting and influencing future policy and governance interventions. The project will move beyond the previous descriptive approach ('what' questions) to explanatory ('how') questions and normative ('should') questions which could inform policy, regulation and legislation.

Background

There is widespread concern that we are currently experiencing a global information disorder characterized by the large-scale contamination of the public sphere with rumors, hate speech, dangerous conspiracy theories, harmful misunderstandings, and orchestrated campaigns of deception. This disorder is often seen as a confluence of a rapidly changing media ecology and an increasingly fractious, populist, and decentered political environment (Tumber and Waisbord 2021, 1). Global concerns about false and misleading information, especially on social media and messaging platforms, keep growing (Newman 2021). The "infodemic" of false, misleading, or harmful information related to the Covid-19 pandemic (WHO 2021) has accelerated these concerns and garnered considerable research attention. There has been a strong growth in concern about the situation in popular discourse. Media users report the perceived increase in exposure to "fake news" as a key reason for lower levels of trust in news media (Knight Foundation 2018). Global apprehension about false and misleading information continues to rise, with particular concerns about the widespread popularity of messaging apps in the Global South (Newman 2021). Instead of transparent, agonistic public debate and scientific process to support truth claims, the "post-truth" populist

public sphere tends to draw on binary political identities for support (Tumber and Waisbord 2021, 21).

Despite information disorder being a widespread problem in countries in the Global South, the study of mis- dis- and mal-information remains dominated by theoretical paradigms, examples, and case studies drawn from relatively recent experiences in Global North contexts, such as the spread of political disinformation around the 2016 elections in the United States. This is despite the fact that phenomena now associated with what is currently known as ‘information disorder’ has been a much older problem in the Global South, often predating the social media era. Across the Global South, organizations and movements have arisen to combat this problem. More research on the way that these organizations work; how their responses are informed by social, political, economic, and historical contexts; and what strategies they perceive to work best, can provide important insight into how to design responses to improve the quality of information, enhance access to such information, and strengthen freedom of expression across the Global South. Moreover, these insights can also hold lessons for similar work to counter information disorder on a global level.

The manifestation of information disorder around the world has given rise to a burgeoning research area, which includes analysis of issues ranging from election manipulation, populist politics, and influence operations to questions of media trust and implications for journalism practice, as well as the implications of the Covid-19 infodemic.

One of the most influential typologies from the Global North for the concept of “information disorder” comes from Wardle and Derakshan (2017). This conceptual framework identifies three types of information which, taken together, constitute the overall disorder. These information types are distinguished on the basis of their degree of harm and falseness, as well as on the assumed intention of the sender. These elements are referred to as misinformation, disinformation, and malinformation, and distinguished as follows (Wardle and Derakshan 2017, 5, 20):

- Misinformation is when false information is shared, but no harm is intended.
- Disinformation is when false information is knowingly shared to cause harm.
- Malinformation is when genuine information is shared to cause harm, often by moving information designed to stay private into the public sphere. Such information might be based on reality, but it is used to inflict harm on a person, organization, or country (e.g. email leaks, online harassment, and hate speech).

Wardle and Derakshan (2017, 6) furthermore highlight the different elements of such information:

- Actors are distinguished according to their type, level of organization, type of motivation, level of automation, intended audience, intention to cause harm, and intention to mislead.
- The message is distinguished according to its duration, accuracy, legality, imposter type, and target.
- The interpreter refers to how the message is read and what action is taken.

When analyzing information disorder, Wardle and Derakshan (2017, 6) also focus on different phases of information disorder—that is, the moments of the message’s creation, reproduction (when the message is turned into a media product), and distribution (when the media product is made available for consumption).

These different elements specified in Wardle and Derakshan's typology (actors, message, interpreter) create the opportunity to identify different entry points for policy and governance interventions, for example by focusing on the regulation of actors, restricting political disinformation during elections, the correction of the message, or the education of those who receive and interpret the message. Bontcheva and Posetti (2020) use a similar distinction between different disinformation elements in their framework to categorize different types of responses:

- Ecosystem responses are aimed at producers and distributors (including legislative, pre-legislative, and policy responses; national and international counter-disinformation campaigns; and electoral-specific responses).
- Responses within the production and distribution of messages include curatorial responses, technical and algorithmic responses, and demonetization and advertising-linked responses.
- Responses aimed at the target audiences of disinformation campaigns include normative and ethical responses, educational responses, and empowerment and credibility-labelling responses.

These typologies raise important questions for further research, especially from the perspective of the Global South. Such questions include:

- How appropriate is the segmentation of phases of the disorder into different elements or types when using more environmental or systemic approaches to analyse intricate architectural and product design issues of digital platforms, and associated issues of accountability?
- To what extent does the typologies of information and regulation include a focus on content (self-)regulation by social media platforms themselves, e.g. the Facebook Oversight Board, on a scale that most countries in the Global South are unable to afford to do by way of monitoring and deal with complaints? What questions does such regulation pose for an analysis of power relations, and what does it mean in terms of the normative values these platforms claim to be safeguarding?

There is a clear need to broaden the field of information disorder studies beyond its current preoccupation with experiences and perspectives from the Global North, which are often presumed to have universal relevance. The recent sharp rise in interest in information disorder started to peak around the 2016 US election campaign. It was during this campaign that concerns around false news, foreign influence operations—including fears about Russian election interference, following this country's previous disinformation campaign in the Ukraine—and the weaponizing of the term "fake news" (Carlson 2020; Farhall et al. 2019; Tandoc, Jenkins, and Craft 2019) became topics of widespread concern. However, the flood of misinformation on the internet started long before the US elections, and extended far beyond the US. The Cambridge Analytica exposé revealed far wider use of Facebook data to undermine democratic processes in Africa (Kenya and South Africa), Haiti and elsewhere, but very little research or media attention has been directed at these cases compared to the situation in countries in the Global North.

Despite this strong growth in information disorder as an area of scholarly and popular interest, the majority of research still views the phenomenon from vantage points in the Global North. As Madrid-Morales and Wasserman (2022) show, of all the articles on the

topic of disinformation/misinformation/fake news published in academic journals between 2000 and 2020, the vast majority refer to countries or regions in the Global North. It is clear that academic research on information disorder has so far “failed to include adequate diversity on matters of geography, culture, and language as well as race, class, and gender” (Lewis and Molyneux 2018, 19). The focus on the USA means that the field currently lacks geographical, cultural, linguistic, and geopolitical diversity (Lewis and Molyneux 2018, 19). This is despite countries in the Global South having had to deal with information disorder long before its recent rise as a scholarly and journalistic preoccupation. The factors feeding into the crisis of disinformation in the North are often much more vividly recognizable in the South. During recent crises such as the Covid-19 pandemic and the Russian-Ukrainian conflict, countries in the Global South often became exposed to disinformation campaigns orchestrated by countries in the Global North to achieve their geopolitical objectives. Research into information disorder in the Global South can therefore also hold lessons for how to understand the phenomenon elsewhere and help us design more contextually informed ways to combat it.

Research problem and justification

The previous scoping report - [Meeting the challenges of information disorder in the Global South \(dspacesdirect.org\)](https://dspacesdirect.org) - made a start on mapping the actors, strategies and approaches to counter information disorder across the Global South. In its study of organisations and actors in Sub-Saharan Africa, the MENA region, Latin America and Asia, the study found that organisations working in the Global South address information disorder as a multi-levelled problem. Because information disorder is embedded in a range of social, political, and economic conditions, and maps onto historical experiences and wider concerns about the quality of communication in these regions, actors and organizations working to counter information disorder increasingly link various issues such as freedom of expression, access to digital platforms, communication rights and media literacy together in their work. For this reason, the previous study recommended a research agenda for future work. This research agenda was outlined as follows:

- More research on information disorder in the Global South is needed, taking social, media, political, and geopolitical contexts into account
- Further research should take the form of critical praxis, which would include both academic and practice-based approaches which should move beyond scoping and mapping of online communities and digital platforms
- Research into ways to counter information disorder in the Global South should include a focus on how to improve journalism in the public interest
- Future work on countering information disorder should focus on establishing collaborations between organizations within and across regions, focusing on cross-cutting topics and trends such as regulation and legislation, political economy of media, freedom of expression, digital rights and access, media literacy, fact checking, and investigative journalism
- Focus areas for research should be developed collaboratively during regular meetings and workshops, where input can be received from a wider group of organizations, activists, journalists and the public

- A key aspect of the research will focus on the location of online misinformation in the context of global monopoly platforms, which often operate without physical presence in the countries of the Global South, so they remain beyond the reach of traditional regulatory and enforcement instruments and without reference to any state. Global governance, powerfully influenced by the European Union with the will and enforcement powers over at least multiple states, however has had the effect of calling these platforms to account for the harms associated with their practice. States in the Global South often lack the political power to enforce similar regulations and policies. These rapidly developing global regulatory and self regulatory mechanisms and their implications for the Global South requires more research than has hitherto been the case.

This project therefore builds on the scoping work conducted previously and follows on the above recommendations. This study will take a more thematic approach and will have as its main objective the development of a theory of change upon which future policy and governance interventions can be based. Methodologically, the new project will move from the previous desk-based mapping study to an empirical study, following qualitative methods (focus groups and interviews) across the regions. The proposed study will furthermore move beyond the previous descriptive approach ('what' questions) to explanatory ('how') questions and normative ('should') questions which could inform policy, regulation and legislation. The implications of information disorder will be analysed by assessing its impact on the region while evaluating different types of responses to the problem.

The proposed study will be guided by seven research questions:

RQ1: What are the key *political drivers and implications* of information disorder in the Global South? (e.g. elections, populism, protests, activism, freedom of speech, regulation).

RQ2: What are the key *social drivers and implications* in the Global South? (factors influencing users, e.g. ethnic polarisation, religious tensions, gender, public health, climate denial, hate speech)

RQ3: What are the key *media drivers and implications* (e.g. trust in journalism, trolling/attacks on journalists, investigative journalism, journalism business models)

RQ4: What are the key *economic drivers and implications* in the Global South? (economic policy, markets, development priorities)

RQ5: How are actors and organizations mitigating these drivers and implications?

RQ6: How effective are these mitigations perceived to be?

RQ7: How can legal, regulatory and governance (or other) responses be designed to better counter information disorder in the Global South?

Objectives:

General objective:

Understand the drivers of and responses to information disorder in the Global South to support policies, governance, regulatory, legislative and social responses to countering misinformation.

Specific objectives:

- To deepen understanding of the information disorder, its drivers and its effects in the global South, including shaping knowledge, theories and the research agenda on mis- dis- and mal information and conducting and coordinating targeted research on key governance and economic challenges.
- To strengthen the capacity of researchers and stakeholders across the global South to understand the information disorder in order to influence policy and stakeholder ecosystems. Includes networking and convening fact checkers, journalists, researchers, policy makers, and collaborators to share knowledge and opportunities, and to build capacity at all levels; and facilitating advocacy and policy stakeholders to be able to respond to new and emerging issues and opportunities.
- To strengthen, build on, expand, and empower stakeholders to influence policy and regulation with evidence. Includes influencing policymaking and policy stakeholders, coordinating efforts across the global South, and raising the visibility and impact of misinformation research in global debates and policymaking.

To achieve these objectives, the study will build on the previous (Wasserman 2022) scoping study, which was based largely on desk-based research, to conduct original, empirical research in the four major regions of the Global South, namely Sub-Saharan Africa, the Middle East and North Africa (MENA) region, Asia and Latin America. Although the research perspectives will be grounded in these regional contexts, the study will move beyond a primary regional focus, to adopt a trans-regional, thematic research approach. The ultimate objective of developing research to support policymaking, governance, regulatory, legislative and social responses to information disorder, will be achieved through a staged process where firstly the drivers of information disorder in the regions will be identified, then the strategies and responses to information disorder explored, until the perceived effectiveness of these strategies can be evaluated. This scaffolding will enable the researchers to develop policy recommendations based on an in-depth contextual knowledge, an understanding of the drivers and motivations perpetuating information disorder, and the strategies and interventions needed to enable change.

The empirical research conducted in this project will contribute to a better understanding of information in the Global South, which remains under-researched in comparison to the phenomenon in the Global North. By gathering primary data from the four regions, the project will develop knowledge about the key drivers of information disorder in the Global South and the strategies deployed to counter the problem. Through its engagement with actors working to counter information disorder in the Global South, the project will critically assess the suitability of different kinds of responses to information disorder which have been noted in literature emanating from the Global South. By way of this evaluation, the study will contribute to developing knowledge about the feasibility of different strategies in specific contexts. This work will enable the study to build on and extend the existing literature while contributing to the ongoing development of a research agenda on information disorder in the Global South.

The process is designed as a collaborative and participatory one, following a critical research praxis approach. The research design has been developed collaboratively through a series of conversations with consultant research teams, representing each of the Global South regions (Sub-Saharan Africa, the Middle East and North Africa, Asia and Latin

America). Each of these teams will work independently to gather data in their respective regions, employing local researchers and drawing on the expertise of local practitioners. Through these collaborations between researchers and practitioners, networks in the regions will be extended and deepened. By working together, both researchers and practitioners will develop further capacity and expertise in the various regions.

The central project office will employ student research assistants and offer bursaries to a Master's and PhD student. This will contribute to capacity building in the field of information disorder studies among a next generation of researchers.

Data will be gathered by each of the teams in their respective regions, and fed back into a central data pool, from where the teams, led by the principal investigator, will collaboratively explore key themes emerging from the research. These themes will then be presented to stakeholders such as civil society organizations, fact-checkers, journalists and policymakers at annual workshops in one of the regions, where they will have the opportunity give feedback on the preliminary findings. Out of these annual meetings, a yearly policy brief will be compiled which will provide a summary of the findings for use by policymakers and other stakeholders. These annual policy briefs will be used iteratively, to inform further stages of the research culminating in a final conference and research report which will contain recommendations for policy interventions and which will inform strategic priorities for stakeholders.

Methodology

Research questions will be investigated in three stages:

Stage 1: Drivers and implications of information disorder

- RQ1: What are the key *political drivers and implications* of information disorder in the Global South? (e.g. elections, populism, protests, activism, freedom of speech, regulation).
- RQ2: What are the key *social drivers and implications* in the Global South? (factors influencing media users, e.g. ethnic polarisation, religious tensions, gender, public health, climate denial, hate speech)
- RQ3: What are the key *media drivers and implications* (e.g. trust in journalism, trolling/attacks on journalists, investigative journalism, journalism business models)
- RQ4: What are the key *economic drivers and implications* in the Global South? (economic policy, markets, development priorities)

This stage will focus on particular areas where information disorder manifests most clearly. The drivers of information disorder in the regions under study will be investigated, with particular attention to the implications of information disorder on politics, society, media and the economy, with the assumption that these areas are interrelated and that they interact in complex and sometimes contradictory ways. The implications of information disorder for politics, economy and society will be explored from the understanding that a one-directional causal relationship should not be assumed. Rather, attention will be paid to the multidirectional ways in which information disorder influences politics, society and the economy at the same time as

political, social and economic dynamics contribute to information disorder. Comparisons between different media users (e.g. rural vs urban, gender, age, education level, etc) and producers (journalists, bloggers, media organizations) will be drawn. Methods include document research, literature review, focus groups and interviews.

Stage 2: Strategies and responses to information disorder

- RQ5: How are actors and organizations mitigating these drivers and implications?

This stage will investigate which strategies and responses to information disorder are being deployed in the Global South. These may include policy, regulatory, legislative, literacy, journalistic responses. From the data collected in this stage, and also drawing on research from the previous study, a theory of change will be developed which will be discussed with actors and stakeholders in the next stage.

Stage 3: Perceived effectivity of strategies and responses and recommendations for change

- RQ6: How effective are these mitigations perceived to be?
- RQ7: How can legal, regulatory and governance (or other) responses be designed to better counter information disorder in the Global South?

This stage will explore the experiences, attitudes and perspectives of actors and organisations working to counter information disorder in the region in relation to the strategies and interventions they have used in the past. By evaluating which strategies were successful, which weren't, and what the reasons for successes and failures may be, a theory of change can be developed to guide further policy interventions and governance guidance.

Conceptual and theoretical framework.

A central tension in meeting the challenge of information disorder is the one between freedom of expression and regulation. Depending on how it is designed, regulation can reduce or enhance freedom of expression, both in its individual (the right to express freely) and in its collective facet (the right to access to information). How to respond to mis-, dis- and malinformation while defending freedom of expression has been referred to as a delicate 'balancing act' (Bontcheva & Posetti 2020). Central to this tension is the understanding that the aim of combatting information disorder is to support the right to free expression and access to quality information.

Bontcheva & Posetti (2020: 8) summarize this view as follows: (D) "disinformation cannot be addressed in the absence of freedom of expression concerns, and it explains why actions to combat disinformation should support, and not violate, this right. It also underlines that access to reliable and trustworthy information, such as that produced by critical independent journalism, is a counter to disinformation."

Because information disorder involves different aspects – the actors involved in spreading false or harmful information, the content of such information and the receivers and onward spreaders of this information (Wardle & Derakshan 2017), strategies to counter information disorder have to be equally multi-faceted across different strategic policy and governance intervention points. Such interventions can include those identified by Bontcheva and Posetti (2020 – ecosystem responses, production and distribution responses and responses targeted at audiences.

When considering the most appropriate strategies to counter information disorder, the focus cannot fall on curbing, removing or creating liabilities on the dissemination of false or harmful information alone. Such an approach could stifle freedom of expression by enacting too strict legislation on non-harmful or common users digital platforms, limiting the channels and platforms through which legitimate information could flow or create ways for powerful agents to manipulate the public discourse without accountability.

While information disorder is a growing problem in the Global South, long-standing pressures on freedom of expression and precarious conditions for journalists require particular attention to the other side of the balancing equation in these contexts. The increasing use of disinformation as an excuse of governments in the Global South to clamp down on dissent by means of repressive legislation (as noted in the previous IDRC report, Wasserman 2022) demonstrates the risk of regulation at the expense of freedom of expression.

At the same time, freedom of expression can only serve the public good if it allows for the flourishing of good, verifiable, trustworthy information in the public interest. To this end, attempts to counter information disorder also have to include the support of independent, robust and ethical journalism as well as the promotion of equal access to information and the defence of digital rights. Because information disorder is a complex phenomenon, rooted political, social, historical and mediated factors, actors across the Global South are already developing responses which cut across these intersections. As found in the previous report (Wasserman 2022), the work done by organizations in the region often demonstrate a multi-levelled response to the problem of information disorder. In linking different issues together in an intersectional manner, these organizations illustrate the importance of approaching information disorder as a complex problem which requires holistic responses.

Examples of how different imperatives are linked together by organizations across the region include:

- *Quality of information* is linked with *rights of access* to information and digital technologies, policy interventions on cybersecurity, surveillance, data protection by for instance the AISur consortium in Latin America. The assumption here is that without broadening citizens' access to digital resources, they cannot empower themselves with quality information with which to counter information disorder. Similarly, if their data is not protected, or if governments use digital platforms for surveillance of citizens, the integrity of the public sphere is compromised.
- *Anti-information disorder* work is linked with *media freedom and right to protest* (by for instance Artigo 19 in Latin America) and with the *combatting of hate speech* (by for instance Kashif in Palestine). The linking of these issues is based on the understanding that a democratic public sphere is not one in which only bad

information is rooted out, but where good information is allowed to flourish. This normative ideal is however not shared among all countries in the Global South, with regressions towards authoritarianism occurring in many of them, and democratic ideals further compromised through geopolitical engagements with undemocratic regimes like China which may influence their policy-making.

- *Electoral information disorder* is linked with *internet rights* by organizations like Derechos Digitales in Chile, through advocacy campaigns engaging politicians and digital platforms. By linking these issues, it is made clear that for democratic political processes such as elections to succeed, citizens have to be able to participate in online spaces where political agendas are set and discussed.
- Combining *fact-checking* with *media literacy* initiatives, as is done by for instance Dubawa and Africacheck in sub-Saharan Africa, empowers citizens to not only establish the veracity of information they come across, but also to engage more holistically with the media environment and become more critical and discerning consumers of media. This also entails work that enables citizens to critically engage with questions around the *political economy* of media, such as ownership, state influence and control, and the relationship between media's market orientation and their ability to serve the public interest.
- Several organizations in the regions under study are complementing *fact-checking* with their own *investigative journalism* (Chequeado in Argentina, Verified in Mexico), with *workshops on media ethics* (Falso in Libya) or *journalism training* (Desinfox in Western Africa). The combination of verification skills with journalistic training and the inculcating of ethical values, recognizes that not only should false information be eliminated from journalism, but good, ethical journalism should also be encouraged and developed to counter information disorder.
- One approach to moving beyond disinformation studies is to excavate institutional attempts to challenge Anglo-American understandings of news – and to understand why those attempts failed. This moves away from now-established approaches in disinformation studies and moves toward more systemic analysis of power and more global perspectives. Platform governance may be a comparatively new domain; the power structures enabling platforms' rise are not. To address how platforms contribute to global disinformation means confronting that past. A political economy analysis in this context needs to shift from the traditional role of media in the construction of narratives/ propaganda (manufacturing consent) to a more contemporary focus by shifting the analysis in power relations in geopolitics to disinformation in the context of Internet and global governance. This includes an analysis of the role of social networks as the mouthpieces of state propaganda/disorder. This study will expand on this geopolitical research focus that would also problematise the normative (democratic) assumptions and associated institutions on which there is no longer global consensus, particularly in the Global South.

The overlapping imperatives further illustrate how information disorder is embedded in a range of social, political, economic conditions, and maps onto historical experiences and wider concerns about the quality of communication in these regions. Because these problems are rooted in social contexts, effective solutions for these problems must extend beyond addressing only digital content, but should enable the building of real-world networks, engage politicians and platforms, support independent media, defend human

rights to information, and understand social identity and lived experience. Successful efforts are likely to be those that are holistic and multi-levelled, and built from the ground up rather than imposed from above.

Although similarities in responses, and links between them, can be noted across these contexts, the Global South should not be treated as a monolith. Important differences and variations exist between countries within regions, between different groups within countries, and between different geographical, economic or social contexts. Assuming that a technologically determinist, 'magic bullet' or hypodermic needle approach can be followed across these regions, would therefore be a mistake. More research is therefore needed to establish which responses are most applicable to the phenomenon of information disorder in particular contexts in the Global South, and which of these responses are perceived to be most successful. Furthermore, research has to be done into how these responses by organizations, which are often provided on the level of individual organizations, can be formalized and structured in ways that can inform policymaking, legislation and regulation and global governance, while upholding and developing freedom of expression in these regions. In order to do such an evaluation, the drivers of information in each particular region need to be identified first, to ensure that responses are contextually specific and commensurate with the problem of information disorder as it manifests in a particular region. This is the objective of this study – to identify drivers of information disorder in the various regions, to assess perceived success and appropriateness of responses to the drivers, in order to support policy and regulatory change, which would include both the resistance against information of disorder and the promotion of freedom of expression and quality information.

Data collection and approach:

The project will use primarily qualitative methods to gather empirical data through which to inform the evaluation of responses to information disorder and to arrive at recommendations for policy, legislative, regulatory, journalistic and educational interventions.

Data collection will be done mainly through focus groups and interviews, in addition to document analysis and observational methods. Focus groups will draw on group dynamics and interactions between participants to generate data, while interviews will be used to explore the perceptions, experiences and attitudes of individual participants. Qualitative interviews are considered to be more flexible than survey research, especially in a developing field such as information disorder studies, as it can be steered in different directions and be adapted according to the interaction (Priest, 2010:101).

Individual interviews will be complemented by focus groups. Focus groups have the advantage of allowing participants to react to and interact with one another in a dynamic fashion, generating richer dataset than would be possible through individual interviews only. Focus groups are also well-suited to identify how opinions around important social or political issues, such as information disorder, are starting to form (Priest, 2010: 104).

Both the interviews and focus groups will be based on an interview schedule and focus group guide that will be developed collaboratively between all the research teams, which would allow for some comparability between the data gathered in the respective regions. The aim of this collaboration around the common interview guide is to develop a broad thematic, rather than geographical, approach, while allowing for regional adaptations and additions to account for regional-specific dynamics and contextual issues.

Interviewees and focus group participants will be recruited in the respective regions using purposive and snowball sampling to identify the most appropriate actors involved in countering information disorder in the respective regions, also drawing on networks established in the first project.

Interviews and focus groups will be recorded and transcribed using transcription software like Otter.ai. Where possible, focus groups and interviews will be conducted in local languages, and translated into English to facilitate data analysis. Data will be analysed using a codebook, also developed collaboratively and used across regions. Analysis will be done with the means of qualitative data analysis software like Nvivo.

The research will be conducted in an iterative fashion, structured around annual collaborative workshops, where data will be presented and fed into a common data pool. These workshops, which will be hosted in different locations across the Global South, will also include representatives from civil society, journalists, activists and other relevant stakeholders in the regions. These stakeholders will be given an opportunity to give feedback on the findings and suggest questions for subsequent rounds of fieldwork. From the common data pool, key themes will be identified which will be used to develop a theory of change and make recommendations.

The research will commence by inviting research concepts and budget submissions from each of the research teams to indicate how they will contribute to the research objectives of the project and what resources they will require to conduct research in their regions towards these objectives.

Gender considerations

Gender equity will be an important consideration across all aspects of the project. Within the central project office, gender and race will be important considerations when recruiting research assistants in order to ensure diversity of the central research team. Gender equity will also be strongly encouraged in the regional research teams to be established, by aiming for gender balance in the composition of the research team. Gender is also an important dimension of the disinformation disorder and requires a specific focus in the study itself. Attacks on women journalists, for instance, have characterized orchestrated disinformation campaigns aimed at discrediting the media. Female politicians and political activists have been found to often be the targets of online harassment and threats, for instance through the use of trolls and bots, aimed at undermining their political work. The pervasive presence of gender abuse in online and social media spaces and within disinformation campaigns should therefore be a particular point of focus when the scoping

study is done. For instance, the extent to which regional organizations and actors working in the disinformation space include gender as part of their strategic responses to disinformation and the gender representativity within these organizations themselves will form specific points of focus. The weaponization of gender by populist politicians, gendered attacks on journalists e.g. misogynistic comments and doxxing, and the use of gender stereotypes in the construction of mis-, dis- and malinformation, and how these threats should be responded to, will be included in the topics to be researched.

Ethical considerations

An application for ethics review of the proposal has been lodged with Stellenbosch University's Social, Behavioural and Education Research Ethics Committee.

The following are critical research ethical issues to be considered for the proposed project. Given that the study will involve human subjects, often in contexts marked by political conflict or instability and social polarization, the utmost care should be taken to ensure that the research is beneficial and does not cause harm. The ethical principles guiding the study will be the following (as outlined in the Tri-Council Policy Statement on Ethical Conduct of Research involving Humans):

- Respect for Persons
- Concern for Welfare
- Justice

As far as *Respect for Persons* is concerned, the participants in the study will be treated with dignity and their autonomy respected. Where, for instance due to political pressures or socio-cultural factors, participants' autonomy may be curtailed or diminished, special care will be taken to protect their intrinsic right to life, freedom and dignity. This right may, especially in developing contexts in the Global South, often be bound up in wider social contexts such as the rights of communities, families or religious, ethnic or linguistic groups. As such the individual participant's right to life, freedom and dignity should be understood not in isolation but in-relation. In practice, the principle of Respect for Persons will be upheld in this study by ensuring that participants give consent to their participation and do so on the basis of proper information of what such participation will entail, the risks involved and the benefits of the research to participants, their communities, countries and regions. In contexts characterized by political tension or social polarisation, as is the case in many regions of the South, participants may have to consider these risks and benefits not only for themselves, but also the communities and groupings to which they belong.

The second principle, *Concern for Welfare*, has a positive and a negative aspect. Especially in developing contexts in the Global South, research should strive to have a positive and beneficial impact on the physical, mental and spiritual health of individuals and societies, as well as their physical, economic and social circumstances. The study of information disorder in the Global South has as its aim to bolster trustworthy sources of information and raise awareness of disinformation that is damaging to democratic debate and could have real harmful consequences, as has been evidenced in the false information and conspiracy theories circulating during the Covid-19 pandemic. The intention of the research therefore is

to have a positive impact on the welfare of individuals and communities in the Global South by strengthening the networks, collaborations and coalitions between the various actors and organizations in these regions so as to empower them to fight disinformation more successfully.

The ethical principle of Concern for Welfare also entails the imperative of avoiding negative outcomes for human subjects. While individuals and communities stand to benefit from the knowledge generated through the study of information disorder and the strategies to counter it, there is also a risk that participants may become the targets of attacks and stigmatization, e.g. 'trolling' and 'doxing' online, for their perceived opposition to particular political groupings and actors.

These potential negative impacts should be avoided and mitigated by exercising a duty of care towards the participants. In the context of this study, the confidentiality of participants will be protected as far as possible. However, given that one of the key aims of the study is to gauge the perceived efficiency of different strategies to counter information disorder in the Global South as evaluated by various actors, organizations and networks active in the various regions of the Global South, the need to protect the identity of such actors will be balanced against the beneficial impacts of identifying the various organizations and main actors.

The third ethical principle, that of *Justice*, entails the fair and equitable treatment of human subjects. Linked to the principle of Concern for Welfare, this principle should guide researchers to ensure the maximum benefit of the research for individuals and communities, and the minimum risk of harm. This principle also governs the power relationships in the research process. In the context of this study, the historical balance of epistemological power in media and communication studies has always favoured knowledge production in the Global North. This resulted in the domination of Northern perspectives over Southern ones, tended to limit the role of researchers and research subjects in the South as providers of the raw material of case studies, evidence and illustration for the theoretical agenda set by researchers in the North. One of the aims of this study is to contribute to epistemological redress by identifying ways to strengthen the production of knowledge of disinformation in the Global South through the building of networks and coalitions and facilitating connections among researchers, civil society organisations, journalists and other actors in the field. The field of information disorder specifically is also still overwhelmingly focused on the concerns of regions in the Global North, with a result that policy recommendations, governance interventions and regulatory reforms are mostly developed for Northern contexts. This study will seek to develop a theory of change which is fit for Global South contexts specifically, with the input and participation of local stakeholders. As such, the research project itself is rooted in the ethical imperative of epistemological justice. To ensure that this objective is reached, the research is designed in a way so as to maximise the participation and contribution of these actors themselves. The research instruments and the potential outcomes of the study will be defined, refined and developed in a participatory fashion. Key actors in regional networks will be identified and brought together at national or regional level for discussions as early as possible to help shape the research agenda. The principle of justice would also entail that the largest possible diversity of voices and perspectives be included as far as is practicable, with the aim of avoiding concentration of the study in dominant, well-organized or prominent individuals and groups.

The range of cultural and social contexts will demand sensitivity and empathy with local contexts. To achieve this, research teams will be established in the various regions under study to ensure that local knowledge and perspectives will shape the research agenda and steer the empirical work.

In line with the principle of Justice, the data collected will be accessible to all research teams to use in their own publications and to support their work, and made accessible to research participants. Research findings will be published in an open access format to ensure wide dissemination and use.

Skills development and training

Personnel funding will include a scholarship for a PhD student working on a topic related to information disorder in the Global South. Preference will be given to Black and/or women candidates for the scholarship, which is intended to develop knowledge and research skills in information disorder studies in a next generation of researchers. Postgraduate students will also be given the opportunity to apply for project research assistantships, which will give them the opportunity to develop and deepen their research skills and experience. These assistants will receive training in analytical software such as Nvivo and gain experience in assisting with the facilitation of focus groups and individual interviews, workshops and transcription as needed.

In appointing the members of the consultant research teams, due consideration will be given to gender balance. The project will rely on the coordination of four different research teams based in the IDRC's four developmental regions, i.e. Africa, Asia, Latin America and the Middle East/Northern Africa (MENA). This coordination will be done by the PI based in the central research office at Stellenbosch University, South Africa. Each of the regional research teams will be led by a research consultant who will take responsibility for organizing the fieldwork in their own region, collecting the data and feeding the data back to the common data pool. Final oversight of data analysis and compilation of annual research briefs and the final research reports will be the responsibility of the PI.

Institutions and personnel

The study will be led by the Principal Investigator, Herman Wasserman. Wasserman is Professor of Journalism and chair of the Department of Journalism at Stellenbosch University, South Africa. He is an experienced researcher, and also led the previous project in this area supported by the IDRC, which resulted in the report [*Meeting the Challenges of information disorder in the Global South*](#). The study will be driven in the various regions of the Global South (MENA region, Sub-Saharan Africa, Latin America and Asia) by The same research teams who collaborated in the previous study, will again participate in the proposed study. They are:

- Arab Reporters for Investigative Journalism (ARIJ) based in Amman, Jordan
- Research ICT Africa (RIA), based in Cape Town, South Africa
- InternetLab Brazil, based in Sao Paulo, Brazil
- LIRNEAsia, based in Colombo, Sri Lanka

In addition to these teams, other activists, journalists, civil society organisations and relevant stakeholders will be invited to participate in annual workshops to give feedback and context to the data gathered in the regions, and to provide input in the refinement of research instruments on an ongoing, iterative basis.

Project schedule

Year 1: Stage 1 (RQ1-4)

1. Literature review
2. Recruitment and appointment of research assistants
3. Research instruments for RQ1-4 developed collaboratively, with input from each regional team
4. Administering of research instruments in respective regions
5. Bi-monthly meetings to report back on data gathering and to obtain feedback across teams
6. First annual workshop meeting (rotating venue) to present data on RQ 1-4
7. First annual policy brief publication

Year 2: Stage 2 (RQ5-6)

1. Research instruments for RQ 5-6 developed collaboratively, with input from each regional team
2. Administering of research instruments in respective regions
3. Bi-monthly meetings to report back on data gathering and to obtain feedback across teams
4. Second annual workshop meeting (rotating venue) to present data on RQ 5-6
5. Second annual policy brief publication

Year 3: Stage 3 (RQ7)

1. Research instruments for RQ7 developed collaboratively, with input from each regional team
2. Administering of research instruments in respective regions
3. Bi-monthly meetings to report back on data gathering and to obtain feedback across teams
4. Third annual workshop meeting (rotating venue) to present data on RQ7
5. Third annual policy brief publication
6. Final publication – synthesise annual policy briefs, provide complete overview, make policy recommendations, propose theory of change

Results and dissemination

The research findings will be analysed during each stage of the research, presented to stakeholders in workshops alternately hosted by different regional teams, and published as an annual policy brief. These briefs will be consolidated into a comprehensive, overarching report at the end of the project. Findings will be published on an ongoing basis throughout the duration of the project, both as scholarly publications (journal articles) and in popular outlets (e.g. in *The Conversation*). By engaging with policy-makers in the regional meetings, direct input will be made into policy-making processes and recommendations presented to

policy actors. By connecting with media partners in the regions, the results of the findings will be amplified to reach wider publics, platform regulators and designers, policy-makers, journalists and political actors. Findings of surveys and qualitative research can be released as a comprehensive information package in regionally relevant outlets, having a preliminary impact on the perceptions around the information disorder in each region. The annual workshops will also serve as fora for discussing policy with other stakeholders.

In addition to annual workshops, a major dissemination event will be held at the end of the project. At this public event, research team leaders from all the regions and will present their findings to a wider audience.

Publications will be co-authored with regional research consultants when using data collected in a particular region, with the PI designated as first author. Results will be uploaded in pre-publication form to Stellenbosch University's Open Access Research Repository, SUNScholar, for free access.

When submitting articles for publication, preference will be given to open access journals such as the *International Journal of Communication* (www.ijoc.org) which is available to all readers under a Creative Commons license.

Where articles are submitted to leading proprietary journals in the field of communications (e.g. *Media, Culture and Society*, *Journalism Studies*, *International Journal of Press/Politics* or *Political Communication*), these publications will follow the 'gold' open access option where article processing fees (APC's) are paid in order to provide open access. In these cases, publisher versions of the articles will still be uploaded to SUNScholar repository. APC's are budgeted for in the project budget, and these costs will be supplemented where necessary by Stellenbosch University's Open Access Fund.

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