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1 Introduction: The Public Sphere in Change.

Institutional Perspectives on Neo-corporatist Society

The last two decades have seen far-reaching structural transformations in the public sphere. Few topics have attracted more attention, wild guesses, and misinterpretation, than the prospective effects of ongoing changes in information and communication technology. What even the close future will look like, is highly uncertain. Technology, however, is but one element in the broader social processes of change. Its effects on the public sphere emerge in interaction with cultural and institutional patterns, and thereby citizens' social and political participation.

In order to study these transformations three strands of research are brought together in this volume: research on the public sphere, research on institutional change, and research on the Nordic model. When it appeared more than 50 years ago, Jürgen Habermas' book on *Strukturwandel der Öffentlichkeit* (1962) was a pioneering contribution. Recent transformations invite a re-evaluation and reconceptualization of the theory of the public sphere, originally conceived with reference to the period between the late eighteenth and the early twentieth centuries, as well as its later revisions and developments. As theories of institutional change have been some of the most innovative in the social sciences in the last decade and as they are particularly well suited to analyse the constellation of institutions that make up the public sphere, it is to these theories we turn to understand the processes transforming the contemporary public sphere. The theoretical ambition of the book is above all to develop theoretical insights by close links to empirical studies throwing light on the functioning of the public sphere, how it is constituted, how it may be delimited and what should be seen as its core elements. Even if communicative transformations are taking place on a global scale, their effects differ in various types of society. To make the discussion of the theory of the public sphere as precise as possible, theories of institutional change are applied to detailed empirical studies of one social type – modern Nordic societies, with a particular focus on Norway.

Jürgen Habermas was of course not the first to study the public sphere, amply demonstrated by the four-volume collection *The public sphere* (Gripsrud, Moe, Molander & Murdock, 2010–2011), a compilation of central texts spanning from early Greek philosophy to modern critical theory. Here, the relationships between his conception and those of John Dewey and Hannah Arendt are laid out in detail (Calhoun, this volume). Habermas' work has of course been met with criticism and discussion (Calhoun, 1992 is a *locus classicus*), and it is contextualized and debated in the present book as well. Yet, it is still the most fruitful point of departure for discussions and analyses of problems of the public sphere in modern society.

In *The Structural Transformation of the Public Sphere* (1989 [1962]) the public sphere was conceived as an arena for deliberation and a channel of communication

among citizens and in civil society vis-à-vis the state. Contemporary analyses, then, raise questions involving long term changes in the institutional traits of the state and of civil society. This is particularly important in the Nordic societies, where the state is virtually omnipresent in society. In *Structural Transformation* literature and the arts were accorded a prominent role in the public sphere; in later versions this aspect has come more in the background (Jacobs, 2012); whereas mainstream media studies have gained most of the attention in Habermas' later work (2006, 2009). The present book follows a somewhat different path. A recent book on *The Nordic Media Welfare State* (Syvertsen, Enli, Mjøs & Moe, 2014) has already given a comprehensive overview on the Nordic model in the media field, with main emphasis on "traditional" media. Hence, the discussions on media concentrate on the significance of social media, their interaction with politics, and on the relationship between the media and the PR industry. Simultaneously, the analysis of the public sphere is broadened to general questions of freedom of expression. In modern societies freedom of expression is particularly important in five institutional fields: Media, arts and cultural production, religion, voluntary organizations, and research and higher education. Of these, the two latter are treated more cursorily, mainly discussed in the special chapter on Nordic comparisons (Engelstad, Larsen & Rogstad, this volume).

The Nordic societies serving as empirical base for this volume may be seen as varieties of a common neo-corporatist model, with a strong and active state closely interacting with a dense network of civil society organizations, a high degree of coordination in labor market policies and processes of wage formation, along with a generous welfare state. Here, the Nordic countries stand in clear contrast to the liberal model of UK and USA, but also to the societies of Continental Europe (Esping-Andersen, 1990), albeit closer to Germany and the Netherlands than to Mediterranean Europe. The interaction between the socio-political structure and the public sphere works in a double sense. Not only in terms of base influencing the superstructure, but also by the public sphere being an essential precondition for the shape of the socio-political configuration. The development of the Nordic model cannot be understood without the reciprocal relationship between the public sphere and the socio-economic aspects.

Even if the main focus is set on one country, it yields more than a single case study. Among the Nordic countries Norway represents the strongest version of neo-corporatism; hence it is a strategic case that yields a transference value to the understanding of coordination and conflict in the Nordic model as such, as well as its long term viability. Moreover, similarities and differences between elements in the public spheres in the Nordic countries are specifically discussed below (Engelstad, Larsen & Rogstad, this volume). Beyond this, the theoretical ambition is not that of generalization, but to increase sensitivity to variation, and to single out significant elements driving social change – over time and across societies.

1.1 Institutions and Institutionalization

A common challenge to Habermas' accounts of the public sphere and later works inspired by it is that they rely either on a clear empiricist approach (e.g. descriptions of Parisian salons or London coffee houses) or on mostly conceptual notions about social change (as in the transformation to late modernity). In both cases, specific models of processes of social change on the macro level are absent. The assumption of the present book is that such processes of change are best understood within an institutional perspective, which makes it easier to identify mechanisms of change, trace process changes and reveal patterns of power.

An institution is principally a set of rules or norms regulating the behaviour of individuals, as well as organizations and other corporate actors. It is a framework for action with relatively high stability – more than a convention or informal common understanding (Thelen, 1999). A useful and commonly cited definition by W. Richard Scott is used in several chapters: 'Institutions are social structures that have attained a high degree of resilience ... [and are] composed of cultural-cognitive, normative, and regulative elements' (2001, p. 48). On a deeper level, John Searle (1995, 2010) conceives institutions as basic regularities springing out of speech acts, an idea of particular relevance for studies of the public sphere. Searle gives a principled understanding of the combination of actor-oriented and structure-oriented analysis, where the main link is continuous processes of institutionalization and deinstitutionalization (see Dahrendorf, 1959 for an early formulation). In the research literature, three strands of institutional thinking are often distinguished: rational choice institutionalism, sociological institutionalism and historical institutionalism (Hall & Taylor 1996). However, these are not necessarily incompatible and are often complementary (Thelen, 2012; Engelstad & Hagelund, 2015).

Institutions should be distinguished from organizations, even though there is a certain linguistic overlap (e.g. 'health care institutions', which refer (mostly) to non-profit organizations). Institutions may be conceived as purely informal, but if so they are mostly restricted to small groups in order to maintain stability. In macro relationships, which are the focal points here, formal elements are crucial. They may take the form of agreements, rules or legislation, which have a long-term character; at the same time, these structures must be enacted and sanctioned by political measures, powerful organizations or aggregates of actors. Rules and norms always call for interpretation; as a consequence, they are a constant object of power struggles. Even if the regulative aspect is quite strict, it is open to multiple specifications. Therefore, the regulative aspect of institutions is not deterministic; they rather function as arenas for conflict and competition. Given that actors are restricted by institutional regulation, they are often motivated to influence the structure and working of institutions, for example, by calling for legislative reform.

Despite their regulative nature, institutions are not located at a special, overarching level in social structure. Often they form a nested structure, somewhat like

Chinese boxes, with different levels of specification. A simple example is as follows: The ‘media’ is an institution in a broad sense; within that framework are found more specified institutions, such as the press, and even more specified institutions, such as newspapers (Lundby, this volume).

1.1.1 Theory of Institutional Change

Even though institutions are relatively stable, they are in constant transformation, albeit at a slow pace, due to changes in environment or to processes of reinterpretation. They emerge, widen or restrict their scope, change their extension and may eventually disappear. Attempts to grasp institutional change in theoretical terms come in several versions, according to disciplinary specificities and methodological assumptions (Hall & Taylor, 1996; Thelen, 1999) or types of mechanisms applied (Mahoney & Thelen, 2009; Schmidt, 2002, 2008; a critical discussion in Aakvaag, this volume). For the present purposes, a slightly different taxonomy is selected, linked to the specific mechanisms of the public sphere and its central actors.

First, one set of driving forces emerges where changes in *technology*, and not least communication technology, are pertinent. New technology becomes a source of change in existing roles or forms of interaction. A relatively simple model is that of ‘punctuated equilibrium’ (Collier & Collier, 1991). Societies are assumed to normally be in a state of relative equilibrium and to proceed along existing paths. In that case, changes are elicited by external shocks, be it new technologies, war or economic crisis. They open a ‘window of opportunity’ to the creation of new rules and a new course of action until the next external shock leads to a renewed revision of rules and policy paths. The most far-reaching change of this type discussed in the following is the emergence of social media, discussed by Enjolras & Steen-Johnsen (this volume). Both the technology and its corresponding social patterns are changing so fast that no second equilibrium seems to be established. Alternatively, the process may be interpreted as a cascade of new technologies and modes of communication, which over a decade has resulted in a world-wide hegemony by a few large producers regulating salient parts of the incalculable number of communicative processes.

Second, the public sphere is changed by legislation and other forms of *political intervention*, of particular importance in Nordic countries. Paul Pierson (2004) discussed this form of change with a somewhat different emphasis on what may be termed a ‘contingent model of path dependency’, where positive feedback processes are central elements. Institutional arrangements working fairly well over a certain period of time tend to be self-reinforcing, as acceptance of a given set of rules makes actors adjust to them; this in turn narrows the relevant set of alternatives. Adjustments may take place due to changes in the environment or in preferences. General types of policy regulations are state subsidies to the news media or state ownership of public service broadcasting; they may also change over time as a result of changes

in the environment or in the dominant political ideology. Larsen's discussion (this volume) of legitimacy in highly subsidized culture organizations (opera houses, philharmonic orchestras) is a related example. Here, tensions arise when established state patronage of the fine arts is confronted by public scepticism of support for elite art only. The outcome is a growing concern about the legitimacy of these organizations and increasing demands for special measures to broaden their public appeal.

Third, changes may occur because political actors (independently of the state) are specifically *acting to change the institutional framework*. They define the purpose of a policy reform and the problems it is expected to solve and offer alternative policy instruments and appropriate methods. Schmidt (2008) terms this the cognitive function of political discourse. Aakvaag (this volume) gives several examples of this type of process created by broad socio-political movements using what Habermas (1996) terms the democratic power circuit. Another example is lobbying activity vis-à-vis political authorities, with the goal of changing existing regulations (Engelstad, this volume).

Finally, institutions change primarily as a result of *actions by a large aggregate of actors*, where the explicit purpose may differ from the final outcome. Kathleen Thelen and coworkers have elaborated several models of institutional change along this line (Thelen, 2004; Streeck & Thelen 2005; Mahoney & Thelen, 2009). Four types of mechanisms are discussed: displacement, layering, drift and conversion. *Layering* means that a process of sedimentation takes place when new elements are added to old ones. This may lead to reinforcement of the original purpose or tensions between old and new elements (Engelstad 2015). One example is the inclusion of whistleblowing in the existing framework of workplace democracy, examined by Trygstad (this volume), resulting in considerable tension. Another is the coexistence of social media and conventional media in communication between politicians and the electorate in local politics (Segaard, this volume), where the final outcome may be different uses of media, depending on target groups and the scope of communication. *Displacement* is a more radical form of change, where one institutional arrangement is supplanted by another. A striking example is the exodus of advertisers and ads from paper media to electronic media, creating a new form of hybrid institution. *Drift* is the result of changes in the environment leading to changes in the functioning of an institution. A telling example is the description by Lundby (this volume) of the effects of mediatization on religious understanding and activity. A related process is the redefinition of what is to be considered as works or performances of art. Finally, *conversion* means that an institution remains formally unchanged, but at the same time it redefines its functions. Elgvin and Rogstad (this volume) illustrate the point by discussing changes in the interpretation of the freedom of expression on religious questions in the news media.

1.2 The Position of the State and the Public Sphere

Neo-corporatism implies a strong state with broad contact with civil society. A pertinent question then arises of whether a strong state has to be an authoritarian state or if it may be liberal and democratic, as is implied in interpretations of the Nordic neo-corporatist model. To liberalists, this combination may appear self-contradictory. However, the realization of this notion rests on a complex set of checks and balances institutionalized over a long period of time (Engelstad, Larsen & Rogstad, this volume).

Of special importance in the Nordic public sphere is the constellation of liberalism and social democracy. When the labour movement swept over Scandinavia from the beginning of the twentieth century, liberal values were already anchored in society. One long-term effect was the emergence of a tendency toward political compromise, but it also elicited a dialectical development. Even though the rise of the labour movement entailed a strong growth in state regulations with a paternalist leaning (Slagstad, 2001), in the long run it also provoked responses anchored in liberal values. If the labour movement was dominant for decades, from the 1980s the situation was reversed (Sejersted 2011). In both periods, however, the value sets of liberalism and social democracy existed side by side.

The neo-corporative state is also a liberal state, manifested in its commitment to a well-functioning public sphere. The state engages in public service broadcasting to uphold a serious alternative to commercial channels (Larsen, this volume). Even though the press is privately owned, it is partly subsidized by the state in order to counteract monopoly in opinion formation. A generous cultural policy includes strong support for literature and the arts. Moreover, the state subsidizes a large number of voluntary associations with the same justifications – to promote culture and democratic dialogue in civil society. Higher education is virtually free. To some extent, even religious organizations are subsidized by the state (Engelstad, Larsen & Rogstad, this volume).

Common to state engagement with civil society is a general version of the so-called arm's length principle (Nielsen, 2015), a liberal principle later applied to the sphere of culture policy (Mangset, 2013). This formulation may sound too good to be true (cf. discussion by Larsen, this volume); grey zones and tensions certainly exist between public support and what is often termed the social obligations (*samfunnsopdrag*) of cultural organizations. Nevertheless, a main rule has gradually been reinforced, that economic support shall not entail restrictions on artistic creativity and cultural production.

1.2.1 Freedom of Expression

Robert Dahl (1989, p. 221) emphasizes freedom of expression, along with access to alternative information, as a basic precondition for democratic governance (See also Calhoun, this volume p. M18, on John Dewey). At the same time, freedom of expression is never unlimited but is open to (re)interpretation. It is regulated and restricted by considerations of security policy and overarching national interests, of legitimate secrecy linked to business strategies and of private life and protection against personal defamation (Kierulf & Rønning, 2009). Specifications of these restrictions vary between societies, but they are unavoidable in any democratic state. In order to make freedom of expression meaningful, this balance of principles is handled by institutionalization, through law or otherwise. Institutions embrace a formalized guarantee of the liberty of citizens to express their views in public, very often anchored in the national constitution. In order to work and to be legitimate, restrictions on freedom of expression must be stated with sufficient clarity.

The balance of freedom of expression against other principles invites fierce struggles over interpretations and justifications of the restrictions. One obvious example is blasphemy. In many societies, blasphemy is regarded as a serious crime, in the worst case leading to draconic punishment. In the US, in contrast, blasphemy was never a theme in federal law, and in France it was abolished in 1881. More recently, Sweden, the UK, the Netherlands and Norway have eliminated blasphemy from the criminal code. In several other European states, it is dormant for all practical purposes. A recent example occurred in Denmark, when the artists and publishers of the Mohammad caricatures in *Jyllands-Posten* in 2005 were not prosecuted; the last time the paragraph was used was in 1938.

The complexity of concerns in the field is illustrated by the case of Norway. The issue of blasphemy was thoroughly discussed by the Norwegian Free Speech Commission appointed by the government. Its report (NOU 1999:27), explicitly inspired by Habermas (Kalleberg 2014), suggested an amendment to the Constitution, Article 100 on Free Speech, which was subsequently adopted by Parliament in 2004. The Commission underscored the importance of religious criticism as a vital part of a liberal democracy, even though the issue had taken a new turn due to the new multicultural and multireligious context. Fierce religious criticism may imply that religious feelings are hurt; nevertheless, the value of protecting religious feelings and identities is outweighed by the value of ensuring the freedom of speech (NOU 1999: 27, 6.3.). However, when the amendment was brought to vote in 2004, the political majority voted against abolishing the paragraph on blasphemy (Steen-Johnsen, Fladmoe & Midtbøen, 2016). The issue was brought up again in 2009, when the current government proposed strengthening the paragraph, with reference to tensions in the new multicultural society. The ensuing public debate, however, led to the opposite result; the blasphemy paragraph was abolished altogether (Furseth, 2015, p. 49f). The balancing of principles is also present in the legislation against hate speech, which

also has clear religious connotations. However, in this field restrictions have been strengthened in several countries (Bleich, 2011).

Art and literature have a significant impact on changes in the freedom of expression. A telling example is explicit descriptions of sexuality where there has been a growing liberalization in modern societies throughout the twentieth century. In Norway, the last trial concerning infringement on decency in literature was raised in 1967. Even though the court prohibited the book, it was reissued a few years later, and a new court case has not been raised. Ex ante censorship of films was abolished in 2000. Still, art is not immune to restrictions on expression. One problem here is the delimitation of a work of art, which has been greatly debated for decades, as there has been what is considered as 'expression'. When an artwork takes the form of a performance, the borders between expression and action are blurred (Slaatta & Okstad, 2014). A recent demonstration is a Swedish case in which an artist performed a fake suicide attempt in public and was arrested by the police (Odell, 2009).

Working life is another arena where the freedom of expression is in flux. One area of conflict concerns where the fine line between loyalty and disloyalty to the employer is to be drawn. This also includes reporting illegal action on the part of management. Another question is raised about the balance between work obligations and the expression of political views, for example, on trade unionization. A third area of conflict is between expressing views internally or externally, in conventional media or social media. The rights of employees as citizens have gained more attention and support, and at least on the surface trade unions are generally accepted. In Norway, this has been reinforced by legislation protecting whistleblowing. However, both private and public employers are more prone to keep up enterprise reputation and prevent negative public attention by including statements on loyalty in work contracts (Trygstad, this volume). In particular, employees in the public sector seem to find that their right to freedom of expression is limited by their employer (Trygstad, 2014).

Freedom of expression is not only about legal borders and prohibitions but in practice is also about social tolerance among citizens. Generous legal liberty is culturally restricted by codes of civility in day-to-day interaction. Here too, there are fine lines to be drawn between breaches of decent interaction on the one hand and undue self-censorship on the other. A recent survey study of the freedom of expression in Norway indicates that a substantial part of the population is supportive of social and more formal sanctions on the expression of contempt vis-à-vis special groups in the media and in social media (Steen-Johnsen et al., 2016). A significant aspect of this in the public sphere is self-censorship in the press. The publication of the Muhammad cartoons in Denmark in 2005, and later in Norway, resulted in drastic reactions in the form of attacks on property and threats on the lives of the cartoonists. Subsequent studies indicate that violence and threats of violence against news media actually has a certain influence on publication policies (Elgvin & Rogstad, this volume). However, it is difficult to distinguish between what is a growing consciousness of unfounded

provocations vis-à-vis special groups in the population and what actually amounts to self-censorship among editors and journalists. The 2015 survey on freedom of speech found that even though very few in the population and among journalists would prohibit the publication of provocative cartoons (directed towards Jews, Muslims, Christians), more than 40 percent in both groups stated that the media should be cautious (Steen-Johnsen et al., 2016, p. 76).

Freedom of expression may be regarded as a ‘negative’ freedom as conceived by Isaiah Berlin (1969 [1958]), that is, the absence of external restrictions. But for citizens to be able to express themselves freely, they must also have access to relevant information pertaining to their interests (Dahl, 1989), conceived as ‘positive’ freedom by Berlin (1969 [1958]). The positive freedom of speech puts an obligation on responsible social actors, foremost on the state (Kenyon, 2014) but also on private actors, to secure the ‘infrastructural requirement’ of information (NOU 1999: 27). The state may make documents relevant to internal deliberations in the form of letters, memos or minutes available to the public. Furthermore, the state may take general responsibility for the dissemination of information to the public to ensure an enlightened public debate. In addition, there are implicit or explicit media policies on the part of the state, even in liberal societies (Benson, 2009). Most visible are well-established public service broadcasting and political and partial economic support for the press, found in various forms in large parts of Europe but most extensively in Scandinavia (Syvertsen et al., 2014; Engelstad, Larsen & Rogstad, this volume).

This brief sketch indicates that freedom of expression may be regarded not only as an individual right but also as an institution in a strong sense. It is specified by a set of legislation and formal rules, although these vary across societies. This is complemented by informal interpretations and specifications. At the same time, the openness of regulations allows for competing interpretations concerning both action within given limitations and attempts at changing the rules themselves.

1.3 From Freedom of Expression to the Public Sphere

The foregoing presentation serves as a prologue to discussions of the concept of the public sphere. When Jürgen Habermas published *Strukturwandel der Öffentlichkeit* in 1962, it marked a modest introduction to what much later was to be seen as a major contribution to the social sciences. Habermas’ combination of conceptual innovation and empirical investigation brought the notion of public sphere – Öffentlichkeit – to the fore and thereby laid the groundwork for a lasting reinterpretation of modern, democratic society. Curiously, it took almost three decades before the book was given the attention it deserves, which occurred in the wake of the 1989 English translation, despite earlier translations into Norwegian (1971) and French (1978). As a result, the implications of changes in Habermas’ thinking, which had taken place in the mean-

time, were blurred. Hence, a closer examination of later developments of the theory is necessary to give a realistic assessment of his contribution.

Calhoun's chapter in the present volume puts the work of Habermas within a broader context of ideas developed by John Dewey and Hannah Arendt. Each of these thinkers gives forceful but somewhat selective descriptions of the public sphere. Reading them together yields a stronger theory of public life and democracy. Habermas focused on social foundations and structural transformations of the public sphere, whereas Dewey took a more optimistic view and underlined the significance of indirect consequences, and Arendt emphasized the creativity of political action (Calhoun, this volume, M24).

Another ambition is to sketch and partly rephrase the development in Habermas' thinking on the public sphere as a combination of historical description and normative theory and to (re)interpret it within a framework of institutional change (Engelstad, this volume). This facilitates reflections on the challenges to the theory from the communicative revolutions of the 1990s and 2000s prompted by the emergence of professionalized communication, of the de-professionalized communication of the 'social media' (Steen-Johnsen & Enjolras, this volume) and of the challenges to 'old' European societies prompted by growing pressures from multiculturalism (Elgvin & Rogstad, this volume).

Very crudely, *Structural Transformation* may be divided into two parts. The first is the historical study of the emergence of the bourgeois public sphere in the eighteenth and early nineteenth centuries. The second is a much broader characterization of structural changes in the public sphere in the period between the 1850s and the 1950s. In its original version, the public sphere was described as a network of discussion fora, journals and publishing houses linked to a relatively limited and unified social group (Habermas 1989, p. 31ff). Conversation unrestricted by convention and censorship pointed towards social arrangements based in reason and common interests. In this way, the public sphere was seen as an arena where citizens could discuss artistic and cultural achievements as expressions of the self-understanding of society (Hohendal, 1989; Engelstad, 2003), while at the same time it served as a mediating instance between civil society and the state. The second part of the book describes the emergence of the mass media on a broad scale, along with mass public education and economic-political corporatism. The overarching diagnosis of the second part is that of a decay of the public sphere. Serious literary and political deliberation is absorbed by public entertainment and PR; the responsibility for the upbringing of children is left to the state. Crucial social differentiations are blurred, and the public sphere is re-Feudalized, caught up by a partnership of the political and social elites. Here, a line is drawn to C.W. Mills and *The Power Elite* (1956) as a visible inspiration.

The English translation of *The Structural Transformation of the Public Sphere* secured the book a strong impact and subsequently heated discussion. The description of the emergence of the public sphere invited a large number of historical studies (for a summary, see Mah, 2000). At the same time, a broad set of critical points was

linked to the concept of the public sphere and its roots in the bourgeois strata. Typical questions raised were whether the public sphere should be conceived as one sphere or a set of spheres and whether groups other than the bourgeois public, such as workers or women, should be included in the public or be accorded separate public spheres (Calhoun, 1992). Less critical attention was paid to the diagnosis of the second part of the book, with the effect that Habermas' later revisions of the conception of the public sphere have gone rather unnoticed.

Structural Transformation is a historical–critical exposition influenced by the early Frankfurt School critique of the alienating effects of the culture industry in *Dialectic of the Enlightenment* (Horkheimer & Adorno (1972 [1947])). The historical–critical approach implies that the original normative ambitions of an organization or institution, or even a historical epoch, yield ideal standards for its evaluation. Observed historical changes are judged accordingly. An example often referred to is the norms and expectations of the ‘enlightenment project’. In the present case, whether or not implicit standards for the public sphere are satisfied is at stake.

During the 1970s, Habermas made a decisive break with the Frankfurt School. The historical–critical approach was replaced by an explicit normative theory resting on basic social community anchored in communication. These changes had their theoretical roots in Habermas' conception of communicative rationality, inspired by speech act theory and developed in the *Theory of Communicative Action* (1984[1981]) a decade earlier. Here, he set up three criteria for communication to be rational: actors are able to justify that their utterances (a) live up to claims of truth, (b) are set forth with a sincere intention and (c) are compatible with general norms (1984, p. 99). These rest on a basic condition of inter-subjectivity; for norms to be valid it is presupposed that actors in concert may justify them and reach consensus about them. Thus, Habermas' thinking about the public sphere rests on the normative structures of everyday patterns of communication and the requirements they demand of the participants, explicitly and implicitly.

Further revisions were made by Habermas himself in the early 1990s. In the preface to the German re-edition of *Strukturwandel der Öffentlichkeit* (1990), he reflected on the implications of the significant social changes during the three decades after the book was published. His concerns about the general passivity of the public were partly modified, as the increased level of education has created a greater potential for active participation in social movements and political discussion. In parallel, Habermas has revised his views on the possibilities of democracy. Previous expectations of participatory democracy were toned down, and emphasis shifted to constitutional democracy, along with an acknowledgement that increasing social differentiation had made comprehensive social planning impossible (Habermas 1990).

In *Between Facts and Norms* (1996 [1992]), this new conception was applied to the concept of the public sphere, accentuating its complexity and thereby also its fragmentation in modern society. The public sphere, he writes, consists of ‘... a very complex network stretching out to a large number of overlapping international,

national, regional, local, and subcultural arenas' (Habermas, 1996, p. 373). Despite this enormous multiplicity, however, the various aspects of the public sphere may be held together because they have a common language. To the extent that they relate to the political system, it is possible to cross the borders between the various partial public spheres (*ibid.*).

Whereas the mass media were regarded as a problem in *Structural Transformation*, in the 2000s Habermas explicitly emphasized their central position in a modern democracy. Inspired by modern media studies (Peters 2008), by the mid – 2000s he went one step further, taking as his point of departure empirical studies indicating that the standards of communicative rationality are effective in interaction at the group level. He argued that they may be applied as a critical standard to the public sphere, even if there is a great distance between the level of small groups and the macro structures of the public sphere. This did not deny that the media are also significant power holders, in line with standard media research. However, Habermas postulated that the power of the media is neutralized if two conditions are fulfilled: '...journalists operate within the guidelines of the public task of a "free" press and of an "independent" media system, as laid down by the constitution' (2009, p. 169), while at the same time citizens have the possibility of participating in the public formation of opinion (2009, p. 171). As long as the media enjoy editorial independence from owner interests, like all others they will be affected by the rules of the game of the public sphere.

This change of view of the media is linked to Habermas' assumption that modern societies cannot function without norms furthering common understanding. The public sphere rests on a set of underlying 'rules of the game', shaped by the three criteria of communicative rationality. Utterances in the public sphere are exposed to criticism from different parties and encounter general norms of objectivity as rules of the game for public debate. Thanks to 'the force (*Kraft*) of the better argument', the public sphere acquires a purifying effect. Strategic communication from powerful actors is also bound to be measured against norms of communication (2009, p. 161). Therefore, '... even the powerful actors will only contribute to the mobilization of relevant issues, facts, and arguments' (Habermas, 2006, p. 420). A precondition for the purifying effects, however, is that the rules of the game are consistent and generally recognized and accordingly that there is consensus on what issues are to be discussed.

1.3.1 The Public Sphere as an Institution?

The question may be raised, then, about the more precise content of the concept of the public sphere and its relationship to institutional theory. Whereas Habermas characterizes the public sphere as a network of different types of arenas, he maintained in *Between Facts and Norms* that 'The public sphere should not be conceived as an institution, and by no means as an organization.' (1996, p. 360). But if the public sphere is

not an institution, what is it then? Already the notion of structural change – *Strukturwandel* – indicates the public sphere as a social arrangement with stable traits, albeit going through transformations in the long run. Thus, already in the original book the public sphere is endowed with institutional traits, even if these are not clearly spelled out. Nevertheless, the public sphere may be too complex to be characterized as an institution. A solution, then, would be that even if the public sphere as a generic concept is not conceived as an institution, it is a constellation of core elements that may each be analysed as institutional fields with specific modes of operation.

Habermas (1996, p. 360ff) distinguishes three basic features of the public sphere: It is (i) a social space, an arena where citizens get into contact. It is generally open to anyone who wants to participate, as listener or as speaker, and it functions as a channel allowing various views to be relevant for the formation of society by connection to the state or other authoritative bodies. (ii) The arena facilitates exchanges of opinions, views on common concerns and ideas on the future of society. It is thus an arena where public opinion in a broad political sense is crystallized. (iii) The public sphere presupposes a certain structure of communication, anchored in rational argumentation and linked to the conception of communicative rationality sketched above.

Without denying their usefulness, these points invite further questions. How can such a complex structure as the public sphere be held together, and how is it possible to understand the way it changes over time? The answer to these questions depends on understanding institutional change. Whereas *Structural Transformation* was very fruitful on the emergence and early functioning of the public sphere, the exposition of changes after the mid-nineteenth century is disappointing due to an overly conceptual grounding. Despite references to contemporary sociology, this part of the text is very much an extrapolation of Horkheimer and Adorno's dystopian *Dialectic of Enlightenment* (1972 [1947]). Paradoxically, the new and optimistic vision of the public sphere from the 1990s and 2000s is also basically static.

Take then the cohesion of the public sphere. Habermas postulates that it is constituted by a set of arenas held together by language, which seems less than persuasive. It takes far more power to keep large social structures together than people being able to speak to each other. Some form of institutionalization is a precondition even for minimal integration of such complex structures. Here, the notion of freedom of expression becomes crucial. Freedom of expression is a precondition for the existence of anything like a public sphere. If it decays, the public sphere decays. As argued above, freedom of expression must be institutionalized – articulated and sanctioned by formal rules and stable practices – in order to be effective. If freedom of expression constitutes the basis of the public sphere, another distinction may also be introduced. The extension of the public sphere as social space coincides with the relevance of limitations on the freedom of expression. Therefore, the limits to the extension of the public sphere are found at the cutting edge of where these limitations are enforced or where they on the contrary become irrelevant. If so, the freedom of expression as an institution circumscribes the public sphere.

If the public sphere is a constellation of institutional fields, which are the most important arenas, and how do they interact? Five core institutions were briefly mentioned above: the media, arts and cultural organizations, religious organizations, voluntary organizations and research and higher education organizations. These are meeting places for citizens for reflection and deliberation over central questions in social life. They serve as channels to the larger society and in specific ways set premises for political decision making. They are not direct parts of the state (in contrast to, for example, the courts; state churches are intermediate cases) and must operate independently of political pressures to function adequately. Nevertheless, in specific ways they are in interaction with the state by giving input in politics and by voicing opposition and protest.

What they have in common is that in different ways they fulfil eminently critical functions and thus bring the freedom of expression to the fore. This is the case in several respects. In various ways they all contain critical potential vis-à-vis society by representing alternative ways of interpreting social life. This form of plurality is a result of ongoing processes of social differentiation. Moreover, all five institutional fields are pluralist in the sense that they contain internal tensions and debates between schools, between group interests, between ideological strands and between orthodoxy and heterodoxy. And, despite their specificity due to differentiation, they are critical in their relationships to each other; the arts opposed to science, science to religion and the media to all the others.

In this perspective, the public sphere is mainly conceptualized in spatial terms. However, Habermas also includes public opinion and the formation of public opinion (1989, p. 89ff, 1996, p. 360ff; Calhoun, this volume; Aakvaag, this volume). In English language discussions, this double quality of the public sphere is less prominent; here the main emphasis is put on the spatial aspect. This may be due to the English translation of the German concept of *Öffentlichkeit* into 'public sphere', which has a clear connotation of spatiality, whereas the German notion connotes both aspects. The performative traits, however, are brought to the fore in some research. Mah (2000) points to the salience of informal opinion formation in pre-modern societies, notably during the French Revolution, where institutionalized channels of information were few and scattered. Adut (2012) lays out a broad theory of the semiotics of political performance and scandals in modern societies, and Alexander (2010) has written about the importance of performative success in contemporary US political campaigning. Such processes are events that may have considerable effects when they occur, but they remain volatile as long as they are weakly institutionalized or not at all.

1.4 Aspects of the Public Sphere in Flux

The description by Habermas (1989) of the emergence of the public sphere in France, England and Germany is to a large degree similar to what is found in Scandinavia (Krefting, Nøding & Ringvej, 2014). Both Sweden and Denmark had well-established universities and an active literary culture in the eighteenth century. As mentioned, freedom of the press was legally anchored in Sweden from 1766. Denmark saw a brief period of broad liberalization, with the abolishment of *ex ante* censorship in 1771. After a few years came a period with more strict restrictions but without the reintroduction of *ex ante* censorship. In Norway, the same parallel is found, albeit with a delay of half a century. Up to 1814, Norway was a Danish semi-colony; after partition it took a few decades before a viable national public sphere emerged around 1850.

However, it is striking how much the situation after the mid-nineteenth century differs from the description given by Habermas. One of his most cited social diagnoses is an alleged tendency toward the re-feudalization of modern society (1989, p. 142); the opposite is found in Scandinavia in the subsequent hundred years. The process is rather that of a long-term integration of groups of the population formerly left outside the power circles of early modern society (Aakvaag, this volume). How is this disparity to be explained? One source lies in the varying conceptualizations of the state. If German history from the mid-nineteenth to the mid-twentieth century is a main reference, it lies close at hand to interpret the state as basically authoritarian. This is in clear contrast to the generally democratic character of the state in Scandinavia in the same period. To this may be added a strong and relatively homogenous labour movement with an ambitious, and at the same time realistic, programme of reform. This is strikingly different from the German case with a strange combination of internal strife and political determinism (Berman 2006). In parallel, in all of Scandinavia the breakthrough of broad social movements with a reformist edge was dependent on, and contributed to reinforcing, the public sphere. As underlined by Aakvaag (this volume), the success of the social democratic movement, along with the peasant movement, the feminist movement and several others, rested on its ability to use and reinforce the democratic power circuit, where the public sphere holds a prominent place.

Despite its success, political development in Scandinavia certainly did not take place without backlash and serious conflict. The same is true for the development of the freedom of expression (NOU 1999: 27, chapter 3). Even if starting from a relatively privileged position at the beginning of the nineteenth century, the long-term trend has been one of significant increases. The ability of citizens to take reasoned stands on social questions has improved dramatically, both as a result of education and of access to relevant information. Speaking truth to power has gained acceptance. Ideals of transparency in politics and civil service have been greatly expanded. However, the development has been far from linear and gives another illustration of the grey zone between volatility and institutionalization. One separate tendency is linked to the newspapers. From about 1920 and for half a century, most of them acted as spokes-

men for political parties or ideologies, with the consequence that critical journalism remained underdeveloped. Only from around the mid – 1970s would it make sense to talk about an independent press in a strong sense in Norway.

In parallel, a counter trend is observed, not least connected to tensions around immigration, religious pluralism and international terrorism. Despite legislation protecting whistleblowing, employees encounter stronger formal requirements of loyalty (Trygstad, this volume). Threats of physical violence for breaking religious taboos have occurred after 2000, most acutely in Denmark after the publication of the Mohammad cartoons in 2005–2006. Are journalists and editors unduly forced into silence or self-censorship on central topics? In-depth studies of prominent representatives of the press in Norway (Elgvin & Rogstad, this volume) leave the answer open. Some reservations are visible, but it is difficult to tell whether they are reactions to threats or represent a better understanding of how to cover topics that are sensitive to the feelings of religious or ethnic groups.

If the news media traditionally have enjoyed a privileged position among the public sphere institutions, this is no longer self-evidently the case. One aspect of the revolution in communication is the growth in professionalized communication, with the emergence of the PR industry, not least as a response to critical journalism. Its strategic nature seems to change what Habermas termed ‘the rules of the game’ and create new challenges to the evaluation of professional norms of news mediation (Engelstad, this volume). At the other end of the spectrum lies the mostly nonprofessional communication cultivated in the social media. In this development, the Nordic countries are spearheads. Four of the five Nordic countries are in the top ten on the ICT Development Index, while Finland is ranked number 12; all of them are rated well above, for example, the US, which is ranked number 15 in the world (International Telecommunication Union, 2016, p. 46). At the same time, the mode of news coverage is changing fast, from broadcasting and print newspapers to digital media.

The Internet and the social media obviously represent an extension of democracy (Enjolras & Steen-Johnsen, this volume). What is revolutionized is not only the medium of communication but also political functionality and aesthetic norms. Centres of political agenda-setting are moving from conventional journalism to the virtual arenas of the social media. The efficiency of the social media offers potential for mass mobilization by social movements or ad hoc demonstrations to expand to a degree previously unheard of. The social media enormously increase the opportunity for ordinary citizens to express their personal and political views. At the same time, this improvement in the freedom of expression is counteracted by the increased opportunity to pester other people, also offered by the Internet, with the result that many prospective participants in political debates withdraw from the public space to escape harassment. The location of social media in a grey zone stretching into both the public and the private sphere is one reason for some of the ambiguities in the norms of communication.

The effects of social media on national politics are best demonstrated by the US presidential campaigns. They also affect politics in Scandinavia, albeit to a more modest degree. A study of Twitter in the 2013 Norwegian parliamentary campaign demonstrated how Internet technology leads to the emergence of new types of opinion leaders, thereby making it easier for newcomers to gain access and for small parties to increase their visibility (Enjolras & Steen-Johnsen, this volume). However, for social media to be fully efficient, a common use must be established between politicians and voters, which means that they must be institutionalized as a shared arena for political communication. And they still have to compete with conventional modes of communication via face-to-face encounters and old fashioned newspapers. In the foreseeable future, at least, social media and other forms of communication are not exclusive but rather complementary (Segaard, this volume). At the same time, the fear of a digital divide (Norris, 2001) is not unequivocally supported in societies where Internet coverage is virtually total. If digital divides exist in terms of participation in political debate on different digital arenas, social media also have a mobilizing effect on citizens with a relatively low degree of participation in formalized politics when it comes to participation in demonstrations and ad hoc political action (Enjolras et al., 2013). Therefore, social media may soften rather than reinforce traditional democratic divides (Segaard, this volume).

In *Structural Transformation*, two aspects of the public sphere held a privileged position, the political and the literary. Literature would bridge the distance between the public and the private sphere, while at the same time serving as a measure of the moral qualities of society (Hohendahl 1989). In Habermas' later versions of the theory, the literary aspect is relegated to background. But the theme certainly still deserves attention and has more recently been taken up by cultural sociologists (Alexander 2006; Jones, 2007; Jacobs, 2012) who have highlighted the aesthetic functions in public communication, as well as the central place of the arts and entertainment media in the public sphere.

The salience of the arts to national identity is still acknowledged in most of Europe, where state-driven culture policy is taken for granted. At the same time, democratization of cultural expression questions the hegemonic position of traditional artistic forms. Arts institutions have gone through considerable change, not least due to the massive presence of commercial popular culture. Therefore, a potential deficit of legitimacy appears in terms of public support for the arts. This is particularly felt in the Nordic social democratic societies, not necessarily in the form of cuts in state subvention but in intensified calls for legitimacy strategies. Behind this lies a combination of changes in artistic hegemonies and growing pressures on the allocation of state subventions to cover not only the 'elite' arts (Larsen, this volume). In Norway, this is expressed in the concept of 'social responsibility' (*samfunnsoppdrag*), which connotes a delicate balance between state responsibility for sustainable artistic production and the obligation to steer clear of dictating content. Similar balancing issues are central to state subvention of the newspaper industry in Scandinavia (Engelstad, Larsen & Rogstad, this volume).

If Habermas has toned down the significance of cultural production in the public sphere, he has over the last decade focused more energetically on religion and the relationship between religion and politics (2008). Traditional theories of secularization have proved insufficient, and a new consciousness about religion has emerged in the public sphere, albeit based on new premises. Habermas points out that religion may serve as a reservoir of moral consciousness and thus holds a legitimate position in the public sphere. In this way, tolerance between secularists and religious believers becomes necessary. Even so, religiously based argumentation has no place in political discourse; here only rational discourse is acceptable, *pace* Habermas (2008).

The ‘return of religion’ reflects a complex set of factors. The immigration of Muslims into Europe and into Nordic societies has created new types of confrontations and debates over religious questions. Additionally, this has resulted in new forms of inter-religious dialogue, which make religion more visible in the public sphere (Furseth, this volume). Informal institutional change is also taking place as the public sphere adapts to the growing mediatization of religion (Lundby, this volume). A form of soft secularization emerges, where religious dogma is fused with humanistic value sets, and the public image of the Church acquires traits of a nongovernmental organization with a strong socio-ethical message (Repstad, 2010).

Due to such processes, religion constitutes a new form of social force that may challenge Habermas’ separation of religion and politics. Broad ethical reflection emphasizing love of one’s neighbour and respect for the work of creation elicits religious activism in such diverse fields as immigration policies and environmental policies and partly in opposition against formal political processes. Simultaneously, ideals of religious dialogue strengthen tendencies to restrict the freedom of expression (Elgvin & Rogstad, this volume), on a broader basis indicated by recent studies in Norway (Steen-Johnsen et al., 2016).

1.4.1 Elements in an Institutional Theory of the Public Sphere

The foregoing reflections may be summarized in a few points pointing towards a generic theory of the public sphere. The ambition is not to “refute” Habermas (or Arendt and Dewey), but to draw inspiration from their work. This is done by providing building blocks which make understandable empirical variations in the public sphere, over time and across societies. Seven main elements are singled out.

Type of state. As a main addressee for the public as well as a regulative instance of civil society, the form of the state is crucial to the form of the public sphere. Crudely, the state may take a purely liberal form, with minimal intervention into civil society, and thereby into the public sphere. Alternatively, the state may have an autocratic strand, bent on control of civil society. Or, the state may be of the neo-corporatist type, with strong interventions into civil society, while at the same time upholding a liberal disposition.

Freedom of expression. Without freedom of expression, the public sphere disintegrates. Freedom of expression varies according to the degree of negative freedom of unimpeded expression, restrained by the occurrence of censorship. Censorship may be both formal and informal, imposed by legislation or by mores and sentiments in the public. A second dimension is the positive freedom of expression, manifested in guarantees of citizens' access to information, and the degree to which this is seen as a responsibility of the state.

Institutional fields comprising the public sphere. Five fields have been singled out as the core of the public sphere: the media, research and higher education, voluntary organizations, arts and culture, and religion. They may vary in the degree to which they operate as closed and self-sufficient, or embody voices directed to the broader public.

Modes of integration in the institutional fields. Institutional characteristics determine to which degree the five fields remain isolated from each other or have potential to form common spaces for learning, debate and conflict. Integration is also furthered by mediation, which means that the "media logic" invades institutional fields other than the media themselves. Moreover, integration is shaped by the commonalities of state intervention, regulation and support; legally, economically, and otherwise.

Access to the public sphere. Access to the public sphere may depend on gender, social class, language, ethnicity or other characteristics. Access may be restricted on formal grounds or by strong informal sanctions. The emergence of social media, and the interplay between established media and social media may have significant effects on access to the public sphere, but thereby also on the shape of meeting points in the public sphere.

Normative patterns. Social differentiation entails differing normative patterns in different institutional fields. Different forms of occupational ethics may be in conflict with each other, as often observed by the ethos of medicine and bureaucracy. Tensions create normative grey zones, which may be made the object of formal regulation, or they may be mastered only by recourse to some sort of meta-ethical position ("on which conditions do we agree to disagree?").

Power struggles. In their most general form power struggles are fought out over interpretations of rights, norms and legitimate expectations in the public sphere. To the degree that public policies are markedly present, they also invite conflict over distribution of economic means. Moreover, ongoing attempts at changing the rules of the game, modifying the mode of operation of institutions, is a central part of power struggles.

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