

## **Contextualized Transmedia Mobilization: Media Practices and Mobilizing Structures in the Umbrella Movement**

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Rejecting the “techno-utopianism” and “social media centralism” in traditional social movement studies, this study emphasizes the multidimensionality of the media and the context of the movement. Mainly using the research methods of ethnography and interviews, this study takes the Umbrella Movement as a case study, to investigate the media practices and mobilizing structures in Hong Kong’s specific sociopolitical context. This work proposes an alternative framework of contextualized transmedia mobilization to explore how protestors situated in a specific context employ, create, circulate, amplify, and converge various forms of media to continually mobilize themselves and the public, and, thus heighten participation levels, innovate contentious repertoires, and experiment with organizational transformation.

*Keywords: Umbrella Movement, media, mobilization, participation, repertoire, organization*

The Umbrella Movement in Hong Kong was originally known as Occupy Central with Love and Peace (OCLP), a self-claimed civil disobedience campaign launched in January 2013 by prodemocracy forces demanding universal suffrage. The campaign has become “the largest mass protest in the post-handover Hong Kong” (“Leung Mentioned,” 2014, para. 2), and has been identified as a sign of “a new era of Hong Kong’s democratic movement” (Tai, 2014, p. D5).

But what exactly are the meanings of this new era? Most scholars and commentators have focused on the new media, particularly social media, which has been described as the most powerful impetus in forming new patterns of social movements in Hong Kong (J. Chan & Lee, 2014). However, overemphasizing the central role of social media may lead to “techno-utopianism” and “social media centralism” that ignore the multidimensionality of the media, the context of the movement, and the agency of the protestors. Therefore, this study rejects the romantic interpretation that simply equates the Umbrella Movement with the so-called social media revolutions around the world; instead, the study attempts to understand the movement through an ethnographic inquiry on the media practices and

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mobilizing structures of the movement in the specific context. Based on a critical review of previous studies on ICTs, social media and social movements, this study proposes an alternative framework of contextualized transmedia mobilization to organize the results of the ethnographic inquiry and to answer the following research question: How did movement participants situated in the specific context employ, create, circulate, amplify, and converge various forms of media to continually mobilize themselves and the public, and, thus heighten participation levels, innovate contentious repertoires, and experiment with organizational transformation?

### **Protest in an Information Society: A Traditional Framework**

Since the 1990s, the development of information and communication technologies (ICTs) has changed the ways in which activists mobilize, communicate, and demonstrate. Scholars from a wide range of disciplines have collaborated to work to understand these changes and have developed a framework as a conceptual scaffold to locate existing and new work in the field (McAdam, Tarrow, & Tilly, 2001). The framework mainly addresses three interrelated factors, namely, mobilizing structures, opportunity structures, and framing process. Specifically, mobilizing structures, the mechanisms that enable people to organize and engage in social movement, attract most academic attention and can be divided into three subcategories: participation levels, contentious repertoires, and organizational issues (Garrett, 2006).

#### ***Participation Levels***

Scholars drawing on the participation perspective argue that ICTs may influence social movements through three mechanisms. First, ICTs have the potential to reduce the costs of communication, participation, and coordination by altering the flow of traditional information and creating new low-cost forms of participation, which facilitate the recruitment, formation, and retention of participants and ultimately contribute to an upsurge in participation (Castells, 2012; Harlow, 2012). Second, ICTs are crucial for fostering collective identity, a perception among participants that they belong to the same social movement by virtue of the same grievances, which can then be mobilized for further collective action (Tufekci & Wilson, 2012). Third, ICTs are able to facilitate the creation of a community online, as well as a dispersed network off-line, to reinforce existing social networks and develop new social connections, which ultimately facilitate collective action (Hampton, 2003; Juris, 2012).

#### ***Contentious Repertoires***

Contentious repertoires in an information society refer to the question of how ICTs have shaped and are shaping protests and the tactical actions they use to pursue their claims of change (Van Laer & Van Aelst, 2010). ICTs not only expand the contentious repertoires by facilitating and supporting off-line collective action but also complement contentious repertoires by creating new modes of collective action (Krinsky & Crossley, 2014). The former refers to the facilitating function of ICTs that promotes *ICT-supported* actions, such as money donation, consumer behavior, legal protest demonstrations, transnational demonstrations, transnational meetings, sit-ins, occupations, and more radical forms of protest. The latter refers to the creative function that creates *ICT-based* actions, such as online petitions,

e-mail bombs and virtual sit-ins, protest websites, alternative media sites, culture jamming, and hacktivism (Van Laer & Van Aelst, 2010).

### ***Organizational Issues***

First, scholars suggest that ICTs, especially social media, are able to promote decentralized, nonhierarchical organizational forms rather than established institutions and hierarchical organization (Castells, 2012). Second, ICTs make activism more feasible because ICTs motivate individuals with individual grievances rather than traditional hierarchical organizations with aggregate resources (Bennett, 2003). Third, ICTs also facilitate collaboration between different social movements, especially by allowing protestors to coordinate actions without an interorganizational hierarchy (Scott & Street, 2000).

This traditional framework proposes a common theoretical framework to align different writings on ICTs, social media, and social movement into a coherent literature. This scholarship also provides the basic theoretical framework for this study, with critical reviews and an alternative framework.

### **Contextualized Transmedia Mobilization: An Alternative Framework?**

These previous studies are usually too optimistic to overestimate the importance of ICTs and social media, running the risk of techno-utopianism or cyberutopianism (Liu, 2015; Morozov, 2011). This cyberutopianism over interprets ICTs, especially social media, and simplifies the dynamic relations between social media and social movements into to a linear causal relationship. But some scholars have questioned this overinterpretation and doubted social media's effect in social movements (Christensen, 2011; Rinke & Roder, 2011). Some of them even hold an oppositional position, a techno-dystopian or cyberdystopian standpoint, expressing concerns about the ICTs and social media becoming a threat to social movement and, ultimately, democracy. For example, focused on the dynamics of online activism and government control in China, some scholars have argued that the rising levels of online activism do not necessarily lead to China's democratization; rather, the Chinese government has used the ICTs to conduct "Internet control 2.0" to strengthen the ability to govern, achieving the purpose of authoritarian consolidation (Franceschini & Negro, 2014; MacKinnon, 2011).

Moreover, techno-utopianism or cyberutopianism is a specific type of ICT centralism or social media centralism, a techno-centralist standpoint grounded in structural understandings of ICTs, social media, and social movements (Hands, 2011; Mercea, 2011). However, there has been skepticism and critical reservation about the centralism of ICTs and social media may play in the mobilizing structure of social movements. They mainly argue that ICTs and social media should be located in a broader field of the media environment and social media networks rather than regarded as a central and even transcendent agent beyond the social movement (Diani, 2000; Van Laer & Van Aelst, 2010). In other words, we should not just target ICTs and social media and regard them as the only isolating and determining type of media, but we should also pay attention to various types of media—traditional media, alternative media, and embodied media, and more importantly, personal communication and emotional interaction in real-world social movements (Juris, 2012).

Furthermore, cyberutopianism also exposes the insufficiency of romantic interpretations that exclude the contexts of social movements. These decontextualized studies have failed to situate social media and social movements adequately within the dynamic contextual entanglement of political, historical, political, cultural, and social factors (Fuchs, 2012). For example, in the case of the Arab Spring uprisings, social media did not suddenly provoke the uprisings. Rather, the uprising had roots and routes in the political activism in Arab countries. This sociopolitical context accumulates people's grievances about oppressive and corruptive governments, and finally motivates and facilitates the uprisings rather than being facilitated by the social media (Liu, 2015). Regarding the Hong Kong context, traditional mass media have played a central role in Hong Kong's large-scale social movements in posthandover Hong Kong (J. Chan & Lee, 2007). Furthermore, Hong Kong's traditional social movements mainly rely on the interpersonal networks established through physical and verbal contact among friends and peers rather than virtual social networks (F. Lee & Chan, 2011).

The aforementioned literature review teases out the relationship among ICTs, social media, and social movements. Following this research trajectory, this study mainly focuses on the inner richness and complexity of the mobilizing structure, from three main dimensions—namely, participation levels, contentious repertoires, and organizational transformations. However, this study rejects the romantic interpretation that simply equates the Umbrella Movement with the so-called social media revolutions from a social-media-centralist standpoint. Instead, attention is paid to the transmedia mobilization system in Hong Kong's specific sociopolitical context. In this sense, taking the Umbrella Movement a case study, this study attempts to propose a possible alternative framework—contextualized transmedia mobilization—of the mobilizing structure in social movement studies. It is a dynamic mechanism rather than a fixed formula, to understand how various types of media inextricably intertwine with each other to exert influence on the mobilizing structure—participation levels, contentious repertoires, and organizational transformations—of the social movement in a specific context.

This proposed framework of contextualized transmedia mobilization draws not only on previous studies on the mobilizing structure of social movements but also on the inspiring concepts of media networks of communication (Barassi, 2013), and, specifically, transmedia mobilization (Costanza-Chock, 2012). But these concepts merely focus on the networks of different types of media in the social movement (Barassi, 2013), especially the "extensive offline, analog, poster and print-based, and 'low-tech' forms of media production, in parallel with cutting-edge technology development and use (autonomous wireless networks, hackathons, creation of new tools and platforms)" (Costanza-Chock, 2012, p. 378). Contextualized transmedia mobilization in this study, however, regards transmedia not just as the parallels or the networks of different types of media but as a dynamic media environment, an "open, unpredictable and controversial space of mediatization and communication, made up of different layers which continuously combine with one another due to the information flows circulating within the media environment itself" (Mattoni, 2009, p. 33). In this sense, this study places transmedia in the specific sociopolitical context so that "in complex and multilayered media environments individuals simultaneously play different roles, especially in particular situations of protest, mobilization and claims making" (Mattoni, 2009, p. 34).

### Method and Data

Traditional ICTs and social movement studies mainly use quantitative methodologies emphasizing structures of communication, while qualitative methods are still widely underdeveloped (Hands, 2011). Scholars have attempted to address these limitations, but quantitative researches still dominate in this field (Barassi, 2013).

This study tries to combine quantitative and qualitative methodologies, but mainly uses qualitative explanation on the proposing framework of contextualized transmedia mobilization. It mainly applies ethnography and interviews as the research methods. On the one hand, ethnography, especially the participant observation fieldwork, allows the author to examine the mobilizing structures through first-hand involvement in the real-life context, both online and off-line (Julian, 2010). On the other hand, despite the fresh data from fieldwork, ethnography is reluctant to inquire into the deep thoughts of people in the field and their behind-the-screen stories outside the field directly through participant observation. This study, therefore, uses interviews in the fieldwork and even places it at the center stage within the ethnographic inquiry (Miller & Sinanan, 2014).

From October 1 to December 1, 2014, I went to the occupied areas three times and spent nine days and nights there for fieldwork observation and interviews. The fieldwork produced about 10,000 words of field notes and thousands of pictures. Fifty-two interviews were conducted on-site, most of which lasted about one hour. More than 70% (37) of the interviewees were students; about 20% (10) of them were key "small leaders" in the occupied areas; the rest were ordinary citizens; all of them were active participants of the movement rather than visitors who just came to have a look or wander on-site.

Besides personally "being there" to encounter the context, "the smells, sounds, sights, emotional tension, feel" (Wolf, 1992, p. 128) of the movement, I also blurred the boundary between the real and the virtual, and identified some key social media as a "virtual field" to conduct "virtual ethnography." The virtual field included the Facebook pages of OCLP, HKFS, Scholarism;<sup>2</sup> they were the most recognizable organizations of the movement, and Facebook is the most important social media platform in Hong Kong and was most frequently mentioned on-site in the interviews.

### Heightening Participation Levels

As the largest scale protest since Hong Kong's return to China, the Umbrella Movement was also characterized by President Xi Jinping as shaking the sky (Yeung, 2014), suggesting that the movement was not just a defiant protest in Hong Kong but also "an existential threat to the Chinese Communist Party" (Ambrose, 2014, para. 1). But it was not the social media that solely heightened the participation to such levels; rather, it was a transmedia mechanism, with different types of media strategically employed by different agents in different periods of the movement. In other words, the Umbrella Movement was not an ideal or typical "networked social movement" (Castells, 2012, p. 284) or

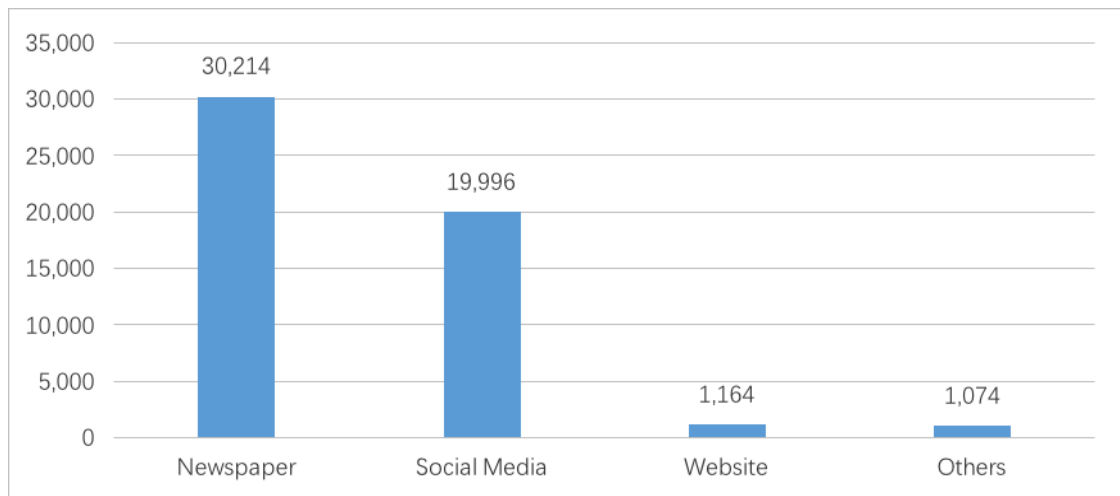
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<sup>2</sup> HKFS and Scholarism were two of the most famous student organizations in Hong Kong. During the Umbrella Movement, the leaders of the organizations were Alex Chow and Joshua Wong.

“connective action” (Bennett & Segerberg, 2012, p. 233) born on the Internet and relying heavily on social media “e-mobilization” (Earl & Kimport, 2011).

### ***Facilitating Recruitment: Dynamic Process***

Early in the movement, traditional media, especially newspapers, played a crucial role in the mobilizing structure. The recognized leaders, the OCLP Trio,<sup>3</sup> mainly published mobilizing articles and provoked debates in newspapers and on television. The quantitative data from the Wiser’s database<sup>4</sup> (see Figure 1) shows that from the initiation (January 16, 2013) to the outbreak (September 28, 2014) of the movement, there were 52,448 related news stories on the movement, over half of which appeared in newspapers (30,214), with 40% in social media (19,996), and a small number on ordinary websites (1,164). Not only the amount but also the “attitude” of the media coverage shows the importance of newspapers in the mobilization of the movement. Preliminary content analysis of the media coverage suggests that most of the newspapers in Hong Kong explicitly supported the Umbrella Movement, with a low percentage of negative reports, a fair amount of neutral reports, and a high percentage of positive reports (Lin, 2016).



**Figure 1. Media coverage of the OCLP, January 16, 2013–September 28, 2014.**

In contrast, the Occupy Wall Street movement initially suffered “invisibility, dismissal, and derision” from the traditional media; thereby, protesters turned to social media for their performance and presentation (DeLuca, Lawson, & Sun, 2012, p. 487). Most of the other Occupy movements also received only subsidiary and simplistic treatment from traditional media (F. Lee, 2015). But in Hong Kong’s specific context, traditional media has always played a central role in Hong Kong people’s daily life, especially in

<sup>3</sup> The three cofounders, namely Yiu Ting Tai, Kin-Man Chan, and a reverend, Yiu-Ming Chu, of the OCLP, were referred to as the OCLP Trio.

<sup>4</sup> See <http://www.wisers.com/en/>.

large-scale social movement (J. Chan & Lee, 2007; F. Lee & Chan, 2011). A survey by Clement So (2014) also shows that the most common types of media employed by Hong Kong citizens receiving political information are ordered as follows: television (52.3%), newspapers (27.3%), social media (9.8%), radio (7.8%), and others (2.8%). According to this survey, relying heavily on traditional media rather than social media for mobilization was quite reasonable and rational for the organizers. In fact, the television did play a crucial role specifically in the outbreak period of the movement (September 28–29). Among the 52 interviewees, 37 of them said they participated in the movement because they were agitated by the live TV broadcast of images of tear-gassed protesters. As one of the interviewees, Helen, said emotionally,

My eyes filled with tears when I watched the TV live broadcast. I kept asking myself, "Why? Why Hong Kong had become such a city? What can I do? What can I do?" And I came out to participate in the movement the next day." (Helen, personal communication, October 1, 2014)

In this period, the effects of TV images and their "mediated instant grievances" (Tang, 2015, p. 341), similar to Manuel Castells's (2012) reference to a "network of outrage and hope," (p. 82) provoked ordinary citizens' outrage and encouraged more people to participate in the protest.

Social media, in contrast, did not play such an important role in heightening the participation levels and in the mobilizing structure early in the movement. For example, the Trio formally launched the OCLP movement on January 2013, but it took until the following April for them to establish the social media sites. According to the fieldwork, the influence of these social media sites was quite limited because few people visited the sites during the early mobilizing stage.

However, the movement was going through a dynamic process; accordingly, the transmedia perspective also required dynamic enquiry. Along with the development of the movement, when HKFS and Scholarism, and their leaders Alex Chow and Joshua Wong, gradually succeeded the Trio to lead the movement, they were more inclined to use social media for mobilization. For example, Scholarism's Facebook garnered 320,000 likes, ranking third in popularity among the movement-affiliated groups, becoming Scholarism's main channel of mobilization, among which 20.9% of the postings were related to mobilization (A. Y. L. Lee & Ting, 2015). The student organizations also understood that the young demonstrators preferred visual images rather than text messages; therefore, 54.3% of their Facebook postings were "lazybones picture packages," comprising pictures with brief explanations, to easily draw the attention of the young audience (A. Y. L. Lee & Ting, 2015, p. 386). In this sense, students, as young social movement actors, have been active and creative in the use of social media for mobilization in social movements.

However, this does not necessarily mean that the movement became a "social media movement." Rather, members of the student organizations, especially the student leaders Alex Chow and Joshua Wong, were sophisticated media users, proficient in communicative mobilization through traditional mass media, employing their own media strategies: First, they treated traditional media interviews seriously, employing authorized spokespersons who had received professional media training. Second, they sought media exposure proactively, represented by certain members assigned to write media articles

and join radio programs. Third, they skillfully employed media logic, using categorized WhatsApp groups to maintain contact with various media to skillfully deliver messages, and even exclusive stories, to certain journalists. Fourth, they actively created media events and scenarios to attract the attention of the media and public, like a hunger strike and even sending a letter of petition to Chinese President Xi Jinping (A. Y. L. Lee & Ting, 2015).

### ***Building Identity: Populist Discourse***

It has been widely recognized that a strong collective identity is important for a successful social movement, because these kinds of “participatory identities” motivate individuals to join specific contentions (Diani, 1995). The identity-building process is not only a cultural construction but also a movement-to-media transaction (Gamson & Wolfsfeld, 1993). The Umbrella Movement did not rely only on this movement-to-media transaction; importantly, it relied on the populist discourse behind this transaction.

According to Ernesto Laclau (2005), identity building is a hegemonic function of populist discourse. The “focuses” on independent events (e.g., election reform) are particular demands under the “logic of difference”, because each demand is unique. All of these events, however, are equivalent to each other in their common opposition to the status quo or the ruling power. Therefore, the possibility exists that one particular demand—“I want genuine universal suffrage,” for example—can become an “empty signifier” to homogenize all particular demands and assume the order of “popular identity”—such as “Hongkonger” or “self-determined Hongkonger” (see Figure 2)—to challenge an enemy on the opposite side of the frontier (Laclau, 2005).



**Figure 2. Postings of populist discourse on the popular identity of “Hongkonger.”<sup>5</sup>**

<sup>5</sup> All of the photos in this article were taken by the author during fieldwork.



However, this kind of identity-building process cannot continue without transmedia populist discourse. Just like the "crafting and repeating slogans" of "We are the 99%," which were incredibly powerful in flooding all types of media and which created a sense of inclusion and majority (Pickerill & Krinsky, 2012, p. 281), the slogan "I want genuine universal suffrage" and the identity of self-determined Hongkonger as a sort of empty signifier and populist identity were also a collusion of all types of media through which people can read different meanings into the words.

As one interviewee, Tom, explained,

There are a thousand Hamlets in a thousand people's eyes. I guess everyone here has their understanding of the meanings of "I want genuine universal suffrage" and has their own specific demands under the same slogan. But it does not matter. We believe that this slogan could cover most of our different demands; it is so powerful that it can unite so many Hong Kong people as one, and persuades us to get involved in this movement. (Tom, personal communication, November 8, 2014)

### ***Creating Community: Affective Interaction***

Once the protestors had built their identity in the movement, they moved to a higher level of participation, the creation of community (Hampton, 2003). The whole occupied area was regarded as a sort of community for most of the participants. They set up camps in the streets; designated zones for studying, sleeping, and discussing; shared resources like water, food, and medical supplies; assigned volunteer task groups; and, more importantly, took care of each other as peer members of the same community.

As one interviewee, Baggio, said,

Although I did not really set up a camp and stay here, I came to the occupied areas every day to join in some collective actions. Because occupation and community in such a scale has never happened in Hong Kong before. So what happens here today calls me to be a part of it. (Baggio, personal communication, October 20, 2014)

In this sense, physical encampment or occupation is not just "making space" (Pickerill & Krinsky, 2012, p. 280) but also about the creation of community and the higher level of participation.

Some participants also created various small communities in which every member had a closer relationship and interaction with each other. Besides daily face-to-face communication, they also used WhatsApp for in-group communication, including information release, daily discussion, and relationship development. As one interviewee, Tim, said, "WhatsApp is very important for us. I could not stay here every day, but WhatsApp can give me the sense that I always stay with them together as a community. It brings me a sort of belonging" (Tim, personal communication, November 11, 2014). In this sense, the transmedia affective transaction was not only a way of nurturing relationships and collective sentiment, but also of sharing sense of "being-togetherness" (Maffesoli, 1996, p. xiii).

### **Innovating Contentious Repertoires**

Previous studies on ICTs and protest repertoires have developed typical typologies of digitalized repertoires in a pretty straightforward way, focusing on two related dimensions: one is ICT-supported “real” action, and the other is ICT-based “virtual” action (Van Laer & Van Aelst, 2010). The critical problem is that the boundary between the “real” and “virtual” is not so clear and absolute, especially from a transmedia perspective in the real-world context (Costanza-Chock, 2012). However, this does not necessarily challenge the concept of *repertoire* itself; rather, it attaches more innovations, possibilities, and imaginations to the term.

For example, one of the most innovative repertoires since the 2011 global uprisings is the spread of “occupation” everywhere. The repertoire of occupation is a performative exercise that turns public space into a media stage for body performance and media spectacle (Kellner, 2013). This kind of innovative repertoire in the Umbrella Movement has laid the foundation for a series of smaller innovative repertoires within the bigger picture of the occupation repertoire.

#### ***Manifestos, Deliberation, and Referendums: Traditional Media Spectacles***

Although Michael Hardt and Antonio Negri (2012) have published a declaration which states that today’s social movements have made manifestos and prophets obsolete, the Umbrella Movement began with the formal publication and release of manifestos by three prophets, the OCLP Trio. As Hardt and Negri (2012) argue, “manifestos provide a glimpse of a world to come and also call into being the subject, who although now only a specter must materialize to become the agent of change” (p. 1). The manifestos of the OCLP provided a glimpse of a world of “democracy, universal and equal suffrage, justice and righteousness” (“Manifesto,” 2013, para. 1) and mobilized the citizens to participate in the movement in three ways (“Manifesto,” 2013). The Trio launched a press conference off-line to release the manifestos on television, in newspapers, and to the public; the action of the publication itself became a media spectacle and thus an innovative repertoire, and vice versa. Subsequently, the OCLP Trio conducted a series of off-line repertoires—namely, three sections of deliberation and a civil referendum—to produce media spectacles to attract the public’s attention, to mobilize them, and to seek their authorization.

Three Deliberation Days were held on June 9, 2013, March 9, 2014, and May 6, 2014, with about 6,000 participants. The participants gathered to discuss the definitions, methods, and principles of genuine universal suffrage in a rational way. However, the deliberation was not an end itself, rather, it was just a means to attract media and public attention and involvement, as indicated by the increasing number of participants and media reports (K.-M. Chan, 2015). However, the deliberation did not achieve final consensus or any practical achievement. The Trio had to launch a bigger event, a civil referendum, to exert a bigger impact on media and citizens. The referendum ran from June 20–29, 2014, involving a total of 787,767,000 residents, equivalent to about 22% of the registered voters (Cheung, Lam, Ng, & Cheung, 2014)

These repertoires were quite different from those in other occupation movements. The deliberation days and referendum were deeply influenced by the theories of public spheres and

deliberative democracy (Ackerman & Fishkin, 2005), rather than the participatory democracy and prefigurative politics that most of the other occupation movements aimed at (Yates, 2015).

### ***Petitions, Profiles, and Photos: Social Media Memes***

In addition to the traditional media spectacles intertwined with the off-line repertoires of manifestos, deliberation, and the referendum, with the development of the movement, a series of online repertoires emerged. For example, 178,000 Internet users signed petitions on the White House's office website to call on the U.S. to intervene in Hong Kong's democratic elections (Griffiths, 2014). A number of Facebook pages and groups, such as "United for Democracy: Global Solidarity with Hong Kong," "Translating Umbrella Movement," and "Umbrella Movement Art Preservation," were established to mobilize people to get involved in the movement in different ways. These online repertoires fall in line with those in other social media revolutions around the world, which have been criticized as being "clicktivism" or "slacktivism" (Morozov, 2011), but have shown their powerful real-world impact more recently.

In the case of the Umbrella Movement, the series of online repertoires also have special meanings in the real world. For example, during the movement, many people on Facebook have changed their profile pictures to a yellow ribbon to show their support for the movement, and have participated in the movement in that way. In this case, the action of posting "yellow ribbon profiles" cannot be simplified as passive clicktivism or slacktivism, but should be taken seriously as sort of social media meme. Internet memes as imitated and reiterated digital items usually have roots in intricate social dynamics (Wiggins & Bowers, 2015). In this sense, the memes have become a kind of contested cultural capital in Web-based communities so that in a decentralized and seemingly chaotic online space, pervasive mimicry has become a mechanism that underpins the construction of "sameness" (Nissenbaum & Shifman, 2015). For example, some participants established a "Yellow Ribbon Photo Mosaic Campaign" Facebook page and turned people's yellow ribbon profiles into a photo mosaic to combine every individual into a collective and community. These social media memes even provoked a new innovative repertoire of "unfriending," by which people "unfriend" a friend with different political views on Facebook as well as in the real world. This sort of repertoire focused not only on sameness but also on difference and showed its impact in the real world.

However, the social media memes did not necessarily lead to the marginalization of traditional media; rather, the case in Umbrella Movement suggests that these two had quite a close relationship. For example, the *Apple Daily* launched the "One Person, One Photo, Supporting the Students" campaign, which asked citizens to share their photos with school uniforms through the WhatsApp and Facebook to show their support of the students' action. Facebook was soon awash with school photos of Hong Kong people, with warm memories of their own, showing empathy to the student activists. In this case, traditional media and social media were not mutually exclusive; it was a transmedia mechanism, rather than a sole type of media repertoire.

### ***"Add Oil Machines" and the Lennon Wall: Global Encouragement and Local Sharing***

The innovative repertoires suggested not only the convergence of traditional media and social media as a transmedia mechanism but also the increase of time-space "distanciation" through alternative media on-site. For example, the participants created global-to-site message channels called "Add Oil Machines." They established a website for people who supported the Umbrella Movement, but could not physically participate in the street protest to leave encouraging messages. These messages were projected by the Add Oil Machines onto building walls in the occupied areas to encourage the protestors on-site to persevere. Furthermore, the participants transformed ordinary places into a media space—the "Lennon Wall Hong Kong" (see Figure 3). They decorated an overpass as a creative hub with various Post-it messages for communication and encouragement, which did not focus on rational discussion, analysis, or consensus, but on the sense of being together in the movement. Through this kind of creative media practice, the participants challenged the "boundedness" of the protest repertoires by connecting "presence and absence" (Giddens, 1990, p. 14).



**Figure 3. Lennon Wall Hong Kong.**

### ***Flash Mobs: Online Commands and Off-Line "Guerrillas"***

In addition to the time-space dimension, some activists also creatively experimented with the online-off-line dimension. Two typical cases were the flash mobs of Occupy Lung Wo Road and Reoccupy Mong Kok, mobilized and organized by anonymous netizens from Hong Kong Golden Forum. On October 14, an anonymous post on Hong Kong Golden Forum mobilized the forum members to occupy Lung Wo Road. It only took the netizens an afternoon to mobilize the participants and implement the Occupy plan,

and at around 9:40 p.m. on October 14, these netizens successfully occupied Lung Wo Road and forced back the police. This successful action encouraged the netizens to conduct more radical activity, Reoccupy Mong Kok, to fight for more political dealing and bargaining.

Previous studies on this kind of action usually focus on how the online communication facilitates the off-line action that gears toward participation augmentation (Mercea, 2011), but the flash mobs in the Reoccupy Mong Kok showed that the online commands and off-line "guerrillas" were intertwined synchronously, with no chronological sequence or primary and secondary order; for example, the online command "Begin!" released at 7:00 p.m. October 18, and the off-line actions began almost immediately, in two minutes.

### **Experimenting with Organizational Transformation**

It has been widely anticipated that ICTs and social media will facilitate the organizational transformation of social movements from institutional, leader-led, vertical, and hierarchical organizational forms to decentralized, leaderless, horizontal, and nonhierarchical ones. Especially since the 2011 global uprisings, Hardt and Negri (2012) even proposed a "declaration" as a clear voicing of support for organizational transformation brought about by social media: "The principles they promote, including equality, freedom, sustainability, and open access to the common, can form the scaffolding on which, in the event of a radical social break, a new society can be built" (pp. 103–104).

However, the case of the Umbrella Movement in Hong Kong suggests that we should not take this sort of concept and assertion for granted; rather, a critical inquiry into the organizational transformation needs to be situated in Hong Kong's own historical matrix.

### ***Assembly and Soft Leaders***

Situated in this specific context and trajectory, the Umbrella Movement in Hong Kong was different from various spontaneous and leaderless uprisings worldwide from the beginning all the way to the end, with recognizable organizations and leaders. For example, the OCLP, HKFS, and Scholarism were the recognizable organizations of the movement; accordingly, the OCLP Trio, Alex Chow and Joshua Wong were the recognizable leaders of the movement, although they refused the title of leaders, preferring to be addressed as initiators, conveners, or advocates. They also built up an ad hoc alliance to form an assembly as a formal institution to incorporate inner differences and coordinate collective actions.

Therefore, the Umbrella Movement was not a typical "leaderless movement," as Castells (2012) observed in other uprisings worldwide. Rather, it had a type of "leaderless leadership" in which various specific persons and organizations served as "soft leaders," even without the formal title of leaders (Gerbaudo, 2012). These soft leaders usually had quite a large influence in the real world. Because unlike the Occupy Wall Street movement, the Umbrella Movement had certain clear goals that necessitated leaders or representatives to interact and negotiate directly with the government. During the fieldwork, I participated in three discussions about whether leaders were needed in the movement. The discussants regarded themselves as ordinary participants in the movement, expecting certain leaders to be

representatives of their interests and to implement proper guidance when possible. Plenty of interviewees showed the same concern. For example, Tim, a middle school student interviewee, argued that “we need a representative to take the first step. Although the movement was self-organized, there must be a well-ordered system to achieve consensus. We can select some representatives to represent us to negotiate with the government” (Tim, personal communication, November 11, 2014).

In fact, HKFS’s leadership seemed to be recognized by the Hong Kong government, which invited five representatives of the HKFS, led by Alex Chow, to hold a two-hour meeting in a televised open debate on October 21, 2014. Another student leader, Joshua Wong, was even selected as the cover figure in *TIME Asia* in 2014, and was nominated for *TIME*’s Person of the Year and named as one of the World’s Greatest Leaders by Fortune magazine in 2015. The fieldwork even found an acrostic poem in a poster that expressed personal worship of Joshua Wong (see Figure 4). Most of the students interviewed also supported HKFS and Scholarism, indicating a type of cult of personality surrounding Joshua Wong and Alex Chow. In this sense, the movement was not an example of typical leader-led activism, nor a totally spontaneous leaderless movement; rather, it was a movement with soft leaders who had “soft forms of leadership” (Gerbaudo, 2012, p. 13) in the movement.



**Figure 4. Poster expressing personal worship of Joshua Wong.**

### ***"No Leaders, No Representatives"***

However, none of the recognizable soft leaders ever had stable leadership or were strong enough to hold control of the entire movement, especially after the negotiation between HKFS and the Hong Kong government, without major breakthrough. The failure of the negotiation caused a severe leadership and legitimacy crisis to the student leaders, and increased the split among different occupied areas. Although the student leaders still urged participants to unite to better press their claims and strike for their goals, their leadership had so severely shrunk that they could not effectively organize the crowd. The movement entered a new stage in which the masses, the ordinary protestors, became the main actors of the movement and the leaders themselves, experimenting with a leaderless and horizontal organization (Yates, 2015).

During the fieldwork, I found numerous posters displaying messages advocating a leaderless movement (see Figure 5). I even witnessed a conflict during the fieldwork in which approximately 10 representatives of the HKFS came to communicate with the participants in Mong Kok; however, they were distrusted by the participants in Mong Kok, and the two sides entered into a dispute. Hundreds of participants even surrounded the HKFS representatives, shouting, "The HKFS cannot represent me." The police had to intervene to prevent escalation of the incident.

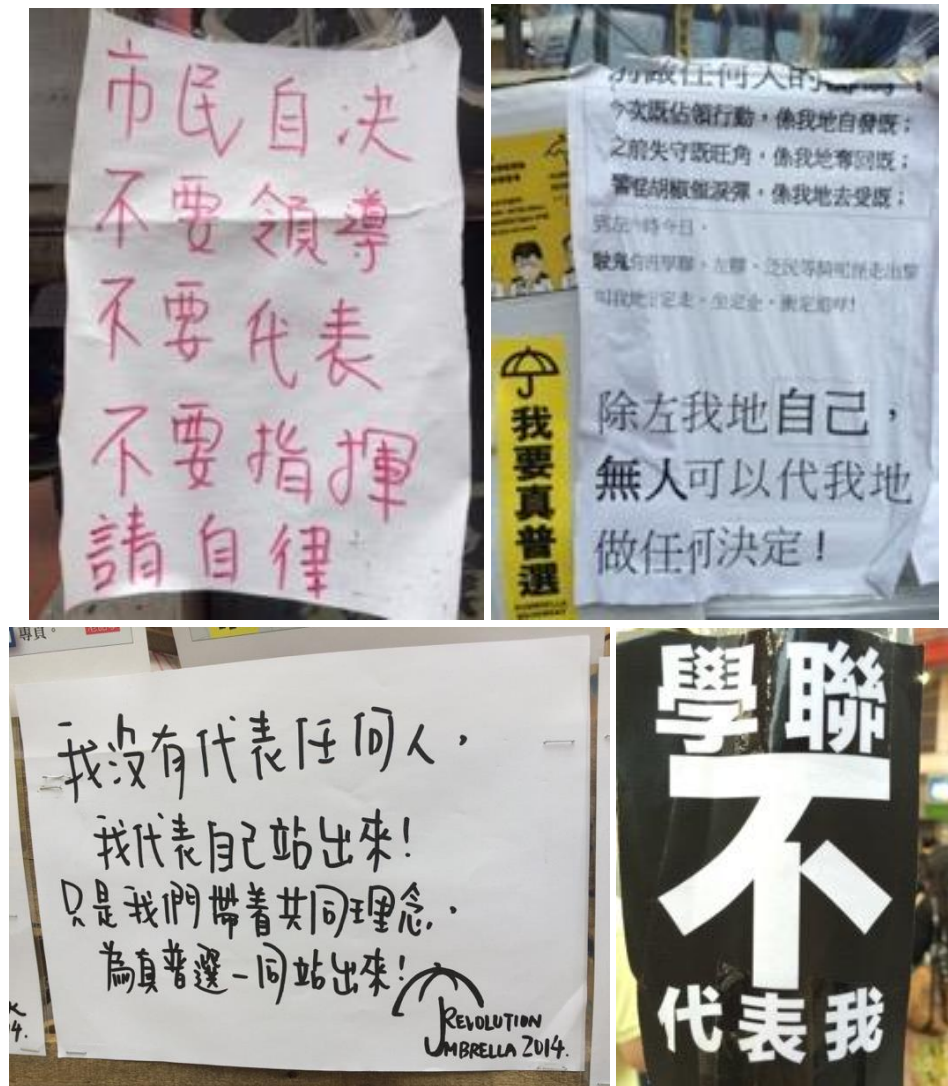
The ethnographic interviews also indicated that most of the participants persisted with the principle of "no leaders, no representatives." As Tommy, one of the interviewees, stated,

Many people had a mindset that social movements always require a leader. Yet, what we are doing in the Umbrella Movement is definitely to demonstrate that it is not necessary to have a leader in a movement. If the government really wants dialogue, they should come to the occupied areas to talk with the people, rather than the so-called representatives. (Tommy, Personal communication, October 2, 2014)

During the fieldwork, an open letter entitled, "No nobility, be people! Let the government directly face the people," signed by "a group of firm Hong Kong protestors" was widely spread throughout the occupied areas, insisting on the principle of "no leaders, no representatives."

However, we should not overromanticize the leaderlessness of the movement and celebrate it as "a spontaneous one without leaders and without the need of leaders" (Ma, 2014, p. D2). Rather, it exposes the ambiguity and ambivalence of leadership, as well as the legitimacy crisis of the representative, becoming "the most serious legitimacy crisis since the return of Hong Kong . . . no social movement groups or leaders can completely represent the crowd in the same movement" (Ke, 2014, p. A21). In this sense, although the leaderlessness of the movement had the potential to prefigure a utopic alternative of social movement organization, the means of the leaderless movements usually were not really equivalent to the ends of struggles over leadership and social changes in the real world. In other words, particular forms of leadership, especially soft form of leadership adapted to the fluid and transformative organizations in the Internet age, are still central to popular mobilization.



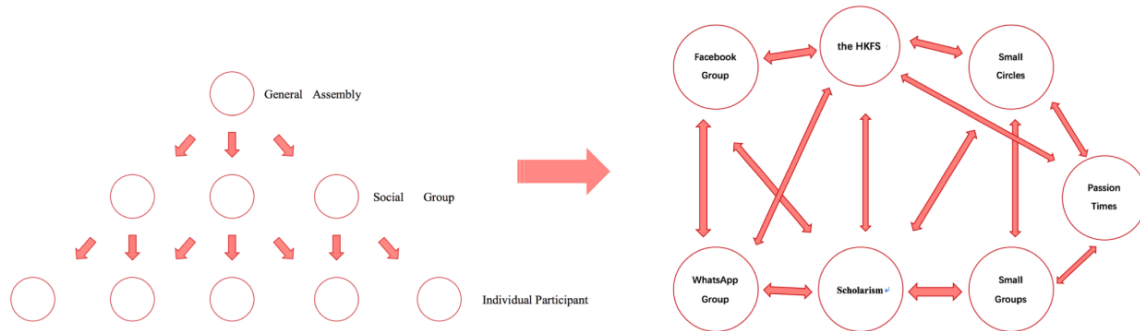


*Figure 5. Posters of "A Leaderless Movement."*

#### **Decentralization and Reorganization**

Because of the legitimacy crisis, the Umbrella Movement could no longer maintain a top-down structure coordinated by the assembly; instead, organizational transformation was further experimented with, and a decentralized organizational structure was formed, consisting of several subfields reflecting differences, contradictions, and even conflicts (see Figure 6).





**Figure 6. Organizational transformation from hierarchical to horizontal.**

Under such circumstances, it was very difficult to identify an all-encompassing entirety of the Umbrella Movement, which was split into three independent occupied areas—namely, Admiralty, Mong Kok, and Causeway Bay—among which the movement as a whole could not “ensure coordination functions and deliberation by interaction between multiple nodes” (Castells, 2012, p. 221). Most of the interviewees emphasized the independence of different occupied areas. As the interviewee Jim stated,

These three districts are all independent and have different cultures and media ecologies. It seems that there are some invisible barriers, holding you back from any other districts. Every district turns out to be a sort of closed circle; it is hard to accept outsiders. (Jim, personal communication, October 18, 2014)

Furthermore, each district had developed a particular form of disobedience, and they did not truly tolerate one another’s differences. The fieldwork in Mong Kok found certain posters expressing dissatisfaction with Admiralty, complaining that the participants in Admiralty were just “playing for fun,” whereas the movement in Mong Kok was the “real street protest with tears and blood.” Even inside each district there were various “villages,” such as Sino Village and Nathan Village, among which a certain type of barrier to “outsiders” was formed (see Figure 7).



**Figure 7. Divisions among and within the occupied areas.**

To some extent, the entire decentralized, disorganized movement was reorganized in every occupied area at the micro level, with inconspicuous small leaders eventually emerging in these small groups as well. According to the fieldwork, each occupied district had divisions, including front lines, community forums, material supply stations, and first aid stations. As Jim explained, "It is not necessary to have a top leader in the movement, but every division has their own small leaders, or at least someone in charge" (Jim, personal communication, October 18, 2014). The small leaders in every small group were more inconspicuous, based on the tacit agreement among the group members. As Tommy explained, "If a person has the capability and reputation, and is recognized by the other participants, then he or she possesses invisible leadership" (Tommy, personal communication, October 2, 2014). In fact, according to the fieldwork observation, Tommy himself possessed this type of leadership and played the role of small leader; when the author proceeded to the material supply station to request interviews, all of the other six persons in the station recommended Tommy, stating that Tommy was a very energetic participant, and was qualified to represent them in the interview. During the interview process, various other participants sought his advice for resolving issues on site.

### **Conclusion: Resurrection of Media Ecology?**

Based on the proposing alternative framework of contextualized transmedia mobilization, this article has investigated the media practices and mobilizing structures in the Umbrella Movement: First, it was a transmedia mechanism that different types of media employed by different agents strategically in different periods of the movement, which facilitated recruitment, built identity, and created community. Second, the transmedia mechanisms had blurred the boundaries of spectacle and repertoire, traditional media and social media, global and local, online and off-line, and redeployed them to innovate contentious repertoires in the real-world context. Third, the organizational transformation of social movements in the Internet age was ambiguous and ambivalent, with paradoxical struggling of soft leadership and leaderlessness, with the tendency of decentralization and reorganization. These research findings may also help us understand the success and failure of the movement from a transmedia perspective. The

transmedia mechanism did contribute to the success of the movement through heightening participation levels, innovating contentious repertoires, and experimenting with organizational transformation, but as time went on, the specific strength had been increasingly offset by the absence of an effective leadership. In this sense, the transmedia mechanism paradoxically produced an opposite effect against the movement itself and imposed severe limits on its political potentials; it shaped the movement on its own web-like image, which, however, proposed challenges to the leadership and legitimacy of the movement, failing to build a mandate in the movement for effective political intervention.

This contextualized transmedia mobilization framework rejects a social media-centralist framework, and, rather, calls for an integrated approach to media, which facilitates a resurrection of the concept of media ecology (Lum, 2006; McLuhan, 1964; Postman, 2000). Neil Postman (1970) offers the founding definition of *media ecology* as “the study of media as environments” (p. 161), in which media affect how people think, feel, and behave. As a concept born in the 1960s, media ecology was initially ignored, but recently has become consolidated as an innovative theoretical framework for media studies due to the development of the Internet and media convergence processes (Scolari, 2012). By resurrecting the concept of media ecology in the current Internet age, particularly in the case of the Umbrella Movement, we will not focus on any sole type of media, but on “complex communication systems as environments” (Nystrom, 1973, p. 3).

Resurrecting media ecology helps us not only to understand transmedia on an ecological level but also to interpret the implication of the alternative framework beyond the set of media itself. As Postman (2000) states, “A medium is a technology within which a culture grows; that is to say, it gives form to a culture’s politics, social organization and habitual way of thinking” (p. 10); if we replace the word *culture* with the word *generation*, this definition would help us interpret the framework beyond media specifically from a generation perspective.

According to surveys conducted in the occupied venues, approximately 90% of the participants in the Umbrella Movement were young activists, with an average age of 27.7 years and a proportion of 48.8% being younger than 25 years (J. Chan & Lee, 2014; Cheng & Yuen, 2014). Therefore, various commentators have argued repeatedly that young activists have “swept away the old,” becoming the “new protesting generation” (Zhang, 2014). The young activists, therefore, were recognized as a new political generation, producing a “youthquake” in Hong Kong’s political ecology (Rauhala & Beech, 2014). Recently, Joshua Wong formally formed a new political party, Demosistō, to “fight for self-determination” for Hong Kong. The young activists, the new protesting generation, have grown up in the media ecology of the Umbrella Movement, becoming a substantial force in the political ecology of Hong Kong.

However, resurrection of media ecology does not necessarily mean we should overemphasize the structuring power of media. By doing so, we would run the risk of essentializing the transmedia mechanism. The precondition of contextualization suggests that transmedia function both as and within environments in a broader sociocultural matrix. In other words, media ecology not only frames social changes, it also situates itself in these social changes, which have already shaped and informed the media ecology. For example, the media ecology produces young activists, while the agency and creativity of the young activists also shapes the media ecology. In this sense, there is an interpenetration, a highly

interpenetrated and interwoven relationship between the media ecology and social changes, reminding us to understand social changes' entwinement with and embeddedness in media ecology and vice versa.

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