

MAPPING DIGITAL MEDIA: COLOMBIA



Mapping Digital Media: Colombia

A REPORT BY THE OPEN SOCIETY FOUNDATIONS

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Contents

Mapping Digital Media.....	4
Executive Summary.....	6
Context.....	8
Social Indicators.....	10
Economic Indicators	12
1. Media Consumption: The Digital Factor.....	13
1.1 Digital Take-up.....	13
1.2 Media Preferences.....	16
1.3 News Providers	20
1.4 Assessments	28
2. Digital Media and Public or State-Administered Broadcasters.....	30
2.1 Public Service and State Institutions	30
2.2 Public Service Provision	34
2.3 Assessments	37
3. Digital Media and Society.....	39
3.1 User-Generated Content (UGC)	39
3.2 Digital Activism.....	42
3.3 Assessments	45

4.	Digital Media and Journalism	46
4.1	Impact on Journalists and Newsrooms	46
4.2	Investigative Journalism	48
4.3	Social and Cultural Diversity	52
4.4	Political Diversity.....	56
4.5	Assessments	58
5.	Digital Media and Technology	60
5.1	Spectrum	60
5.2	Digital Gatekeeping.....	65
5.3	Telecommunications.....	67
5.4	Assessments	69
6.	Digital Business.....	71
6.1	Ownership.....	71
6.2	Media Funding	74
6.3	Media Business Models.....	76
6.4	Assessments	77
7.	Policies, Laws, and Regulators	79
7.1	Policies and Laws	79
7.2	Regulators.....	83
7.3	Government Interference.....	87
7.4	Assessments	89
8.	Conclusions	91
8.1	Media Today.....	91
8.2	Media Tomorrow	92
9.	Recommendations	93
9.1	Policy.....	93
9.2	Media Law and Regulation	94
9.3	Public Service in the Media.....	94
9.4	Digital Media Literacy	95
	List of Abbreviations, Figures, Tables, and Companies.....	96

Mapping Digital Media

The values that underpin good journalism, the need of citizens for reliable and abundant information, and the importance of such information for a healthy society and a robust democracy: these are perennial, and provide compass-bearings for anyone trying to make sense of current changes across the media landscape.

The standards in the profession are in the process of being set. Most of the effects on journalism imposed by new technology are shaped in the most developed societies, but these changes are equally influencing the media in less developed societies.

The **Mapping Digital Media** project, which examines the changes in-depth, aims to build bridges between researchers and policymakers, activists, academics and standard-setters across the world. It also builds policy capacity in countries where this is less developed, encouraging stakeholders to participate in and influence change. At the same time, this research creates a knowledge base, laying foundations for advocacy work, building capacity and enhancing debate.

The Media Program of the Open Society Foundations has seen how changes and continuity affect the media in different places, redefining the way they can operate sustainably while staying true to values of pluralism and diversity, transparency and accountability, editorial independence, freedom of expression and information, public service, and high professional standards.

The Mapping Digital Media project assesses, in the light of these values, the global opportunities and risks that are created for media by the following developments:

- the switch-over from analog broadcasting to digital broadcasting;
- growth of new media platforms as sources of news;
- convergence of traditional broadcasting with telecommunications.

Covering 60 countries, the project examines how these changes affect the core democratic service that any media system should provide—news about political, economic and social affairs.

The **Mapping Digital Media** reports are produced by local researchers and partner organizations in each country. Cumulatively, these reports will provide a much-needed resource on the democratic role of digital media.

In addition to the country reports, the Open Society Media Program has commissioned research papers on a range of topics related to digital media. These papers are published as the **MDM Reference Series**.

Mapping Digital Media: Colombia

Executive Summary

Colombia is one of the most resilient democracies of Latin America, but it has struggled for decades to maintain democratic values in the midst of a long-lasting internal armed conflict between guerrillas, paramilitaries, and government forces. The level of violence and the illegal drug trade has affected the national economy in corrosive ways. The global economic crisis has had only a modest impact on the country, however, and GDP has grown in recent years.

Despite the growth in cable and pay-TV consumption, analog free-to-air television is still by far the most influential source of news. Digitization seems to be increasing both the quantity and range of news and the total public consumption of media.

Regarding the news offer, many traditional outlets now have online versions, while some new online-only outlets have been born in recent years and gained recognition as news providers. Regarding media consumption, internet use, although low in rural areas, is increasing very fast in urban areas and higher socio-economic groups. In this context, the government has recently announced an ambitious plan to improve digital literacy and reduce the digital divide by 2014.

Public media have been strengthened in recent years and public service provision is considered an important issue in Colombia. The transition to digital terrestrial television (DTT) is seen as both a challenge and an opportunity to public media. It is a challenge because the change in equipment and the switch to digital networks for all public channels, especially for the regional channels, requires large funds that might delay the process and put public media at a disadvantage compared with private channels. But it is also a moment of opportunity to review and rethink the duties and obligations of public television in light of the educational and cultural value of public media.

Digital activism has grown in Colombia, and active internet users have proved the power of social networking, which has become very popular. Political debates and hostage rescue operations have, among others, triggered big digital mobilizations, especially on Facebook and Twitter. However, on most occasions this

kind of participation stayed in the digital world and did not become real actions or mobilizations in the offline world.

Digitization has definitely affected journalists' work. On the one hand, it has increased the ways of accessing sources and information, and has given the audience a more active role in information production and circulation. On the other hand, online journalists face almost daily dilemmas in terms of privacy, anonymous sources or unverified information, and the immediacy of the web has become a threat to journalistic rigor.

So far, digitization has not changed the dominant positions in the media market, which in the case of television has concentrated around two private channels. Media and especially telecoms ownership has recently changed toward the transnational corporation model. Transparency of media ownership has increased, as these big media businesses have become news, although there is little information on the potential conflicts of interest of these new actors in the media and telecoms sectors.

The policy and regulatory framework for digital media is still being defined. But while there is no special licensing policy for digital media yet, analog television licensing has very recently been controversial because of the third private television channel adjudication process. In general terms, the media regulatory framework itself is functional, but there are several procedural flaws in the implementation.

Context

Colombia is the third most populous country in Latin America, with 43.5 million inhabitants (in 2009). It has a very diverse cultural heritage that includes Spanish colonists, Africans brought as slaves, and the native indigenous population. The Colombian territory was a Spanish colony for over three centuries, and gained its independence in 1810. Colombia is a constitutional republic made up of 32 departments and a capital district.

For many years, the liberal and conservative parties dominated the national government and were the only two political forces accepted by the constitution.¹ However, since the late 1970s they have lost popularity and several independent parties have appeared. Traditional parties currently have a majority in Congress, but the recently elected president (Juan Manuel Santos, 2010–2014) represents the Social Party of National Unity (*Partido de la U*), a recently formed coalition.

Although Colombia is one of the most resilient democracies of Latin America, with a history of almost uninterrupted elections,² it has struggled for decades to maintain democratic values in the midst of a long-lasting internal armed conflict that deeply harms the country in political, social, and economic terms. The conflict between the guerrillas, the paramilitary, and government forces over land control has raised the level of violence and the illegal drug trade has affected the national economy in corrosive ways.

With GDP increasing over the past few years and an income per head of US\$ 4,930 in 2009,³ Colombia is classified by the World Bank as an upper-middle income country. It is also considered the fourth-largest economy in Latin America. However, over 46 percent⁴ of the total population lives below the poverty line,

-
1. The results of a plebiscite held in 1957 established the liberal and conservative parties as the only political parties. For the following 16 years they alternated in the presidency, with regular elections every four years.
 2. Colombia had uninterrupted elections from 1830 to 1953, when General Gustavo Rojas Pinilla led a coup d'état and became president. However, he stayed in power for only three years, as he was ousted. In 1958 elections were called again. Since then, presidential elections have been held every four years.
 3. World Bank Data, GNI per head, Atlas Method, 2009, at <http://bit.ly/fBZCNz> (accessed 1 December 2010).
 4. *CIA World Factbook*, 2008, at <http://bit.ly/1J7ZTF> (accessed 1 December 2010).

and the country has the second-largest internal displaced population in Latin America,⁵ with an estimate of between 3.3 million and 4.9 million people displaced by the internal armed conflict.⁶

The world economic crisis has hit the country in a very modest way. Since 2008, the inflation rate has fallen from 7.67 percent to 3.73 percent in 2012. GDP per head has also shown a positive trend over recent years and the unemployment rate has remained stable (see Table 1).

5. Internal Displacement Monitoring Centre (IDMC) and Norwegian Refugee Council, *Building momentum for land restoration*, Geneva, November 2010, p. 7.

6. There is a debate regarding the actual size of this population. The lowest figure comes from the government's Registry of Displaced People (*Registro Único de Población Desplazada*, RUPD) and the highest is provided by the Consulting Office for Human Rights and Displacement (*Consultoría para los Derechos Humanos y el Desplazamiento*, CODHES), a civil society organization that puts together a variety of sources, including under-registry people and intra-urban displacement.

Social Indicators⁷

Population (number of inhabitants): 43.56 million (2009)

Number of households: 11.85 million (2009)

Figure 1.
Rural–urban breakdown (% of total population), 2005⁸

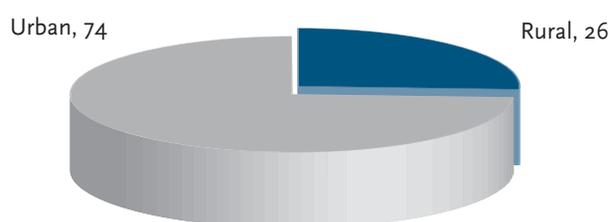
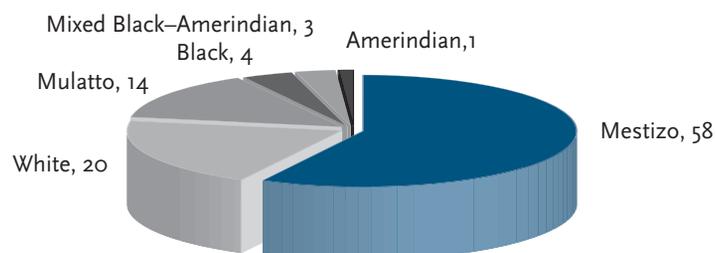


Figure 2.
Ethnic composition (% of total population), estimated 2011⁹



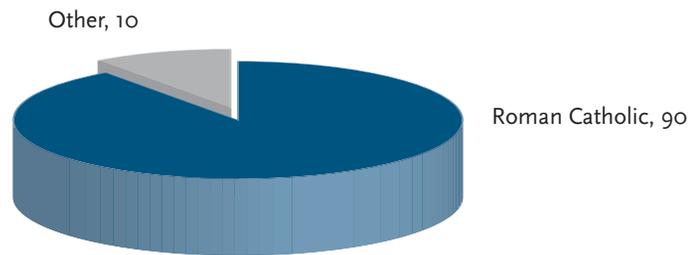
7. National Statistics Department (*Departamento Administrativo Nacional de Estadística*, DANE), September 2010, at <http://bit.ly/h0fHON> (accessed 5 December 2010); DANE and CNTV, “*Anuario Estadístico de la Televisión en Colombia*” (Statistical Yearbook for Television in Colombia), 2009, p. 11, at <http://bit.ly/eVVTnd> (accessed 5 December 2010) (hereafter DANE and CNTV, “*Anuario Estadístico*”).

8. DANE, “*Censo Nacional*” (General Census Report), National Level, 2005, at <http://bit.ly/e56rtJ> (accessed 5 December 2010).

9. CIA, *World Factbook*, at <http://bit.ly/sT6j> (accessed 1 December 2010).

Figure 3.

Religious composition (% of total population), estimated 2011¹⁰



Linguistic composition

Spanish is the official language of Colombia. However, 62 indigenous languages and two Creole languages are also recognized by the Political Constitution as official in the territories where they are spoken.¹¹

10. CIA, *World Factbook*, at <http://bit.ly/sT6j> (accessed 1 December 2010).

11. Ministry of Culture (*Ministerio de Cultura*), at <http://bit.ly/egkmam> (accessed 1 December 2010).

Economic Indicators

Table 1.
Economic indicators

	2005	2006	2007	2008	2009	2010	2011f	2012f
GDP (current prices), US\$ billion	146.62	161.00	210.51	233.72	232.40	283.10	308.57	327.19
GDP (current prices), per head in US\$	3,418	3,709	4,792	5,258	5,167	6,220	6,700	7,021
Gross National Income (GNI), current \$, per head ¹²	7,030	7,640	8,300	8,590	8,780	9,020	9,640	n/a
Unemployment (% of total labor force) ¹³	11.8	12.0	11.2	11.3	12.0	11.6	n/a	n/a
Inflation (average annual rate in % against previous year)	4.8	4.4	5.6	7.6	2.0	3.17	3.73	n/a

Notes: f: forecast; n/a: not available

Sources: International Monetary Fund (IMF); World Bank; National Statistics Department (*Departamento Administrativo Nacional de Estadística*, DANE)

12. Data calculated based on GNI per head by World Bank Statistics, at <http://bit.ly/gS7ruL> <http://bit.ly/hzsE99> (accessed 17 February 2011).

13. DANE, Yearly Household Survey at <http://bit.ly/ROpRsd> (accessed 10 August 2012).

1. Media Consumption: The Digital Factor

1.1 Digital Take-up

1.1.1 Equipment

Most Colombian households are not prepared to access content provided by digital media. Despite the government's efforts to close the digital divide, digital media penetration rates are still low and there is a wide gap in access, equipment, and digital services between urban and rural areas. According to the National Statistics Department (*Departamento Administrativo Nacional de Estadística*, DANE), by 2009 internet penetration in rural areas was still insignificant (0.8 percent), while in urban areas it had reached 16.2 percent of households.¹⁴ The same happened with personal computers, present in only 2 percent of rural households in comparison with 25.7 percent of urban households.

Nonetheless, this gap was smaller in the case of television. Since 2006, television sets have been the most popular home appliance in Colombia, exceeding refrigerators, laundry machines, ovens, and fixed-line telephones.¹⁵ Television has a national penetration of 85.3 percent of households, 92.2 percent in urban areas and 61.7 percent in rural areas. (See Table 2.)

Despite their low penetration, personal computers showed a significant increase rate in the period 2005–2009: the number of households with a personal computer increased by 68 percent.

14. DANE and CNTV, “*Anuario Estadístico*,” p. 12, at <http://bit.ly/edeYYw> (accessed 11 December 2010).

15. DANE and CNTV, “*Gran encuesta integrada de hogares (GEIH), Modulo de Televisión*” (Great Integrated Household Survey, GEIH, Television Unit), 2009, at <http://bit.ly/dC9Dvp> (accessed 18 December 2010) (hereafter DANE and CNTV, “*Gran encuesta*”).

Table 2.

Households owning equipment, 2005–2011

	2005		2006		2007		2008		2009		2010		2011	
	No. of HH ¹⁶ ('000)	% of THH ¹⁷	No. of HH ('000)	% of THH	No. of HH ('000)	% of THH	No. of HH ('000)	% of THH	No. of HH ('000)	% of THH	No. of HH ('000)	% of THH	No. of HH ('000)	% of THH
TV set	8,159	85.0	8,396	85.5	n/a	n/a	10,452	88.4	10,480	87.4	11,084	91.2	12,279	94.3
Radio set	6,815	71	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	9,358	77	n/a	n/a
PC	1,401	14.6	1,610	16.4	1,823	18.6	2,694	22.8	2,705	22.6	3,172	26.1	3,735	29.8

Note: TV: television; PC: personal computer; n/a: not available

Source: International Telecommunication Union (ITU)

1.1.2 Platforms

Audiences and media platform preferences began to change around 2000. Until then, free-to-air TV, transmitted in analog signal, dominated the Colombian media landscape. Since then, the number of pay-TV subscribers has almost trebled. They grew from 842,000 subscribers in 2000 to 3.7 million in 2011. However, by 2009, the penetration of pay-TV in rural areas was still low, with only 338,910 subscribers (11.2 percent of total households) due mostly to coverage problems and costs. As regards socio-economic levels (a social stratification system that divides society into six levels, where 5 and 6 represent the upper classes), free-to-air TV has a penetration of 67.7 percent in level one and 8.4 percent in level six, while pay-TV has 21.7 percent penetration in level one and 91.6 percent in level 6.¹⁸ (See Table 3.)

The television system in Colombia has a total of 764 operators divided into free-to-air and pay-TV. Free-to-air TV has three public national channels, eight regional public channels, two private national channels, and 48 local channels. Pay-TV is divided into 54 cable subscription-based operators, two satellite subscription-based operators, and 647 community operators.¹⁹ As is shown in Table 3, terrestrial reception TV is the most popular platform in Colombia; however, since 2005, the percentage of households owning the equipment has decreased due to the digital take-up. According to the data, cable reception grew from 15.6 percent in 2005 to 26.5 percent in 2009.

Internet Protocol Television (IPTV) is a new service that is fast gaining popularity among Colombians. It was launched in 2008 by UNE-EPM Telecomunicaciones, a division of Empresas Públicas de Medellín SA (Medellin Public Enterprise SA, EPM), the largest telecommunications company of its kind in the country. Since then, its penetration has grown from 65,300 subscribers in 2009 to 90,900 in 2010.

16. Total number of households owning the equipment.

17. Percentage of total number of households in the country.

18. DANE and CNTV, "Anuario Estadístico," p. 11, at <http://bit.ly/edeYYw> (accessed 11 December 2010).

19. CNTV, "Actualidad y Futuro del Mercado de Televisión en Colombia" (Actual State and Future of the Television Market in Colombia), June 2009, p. 9, at <http://bit.ly/hxYk5W> (accessed 12 December 2010).

Table 3.

Platform for the main TV reception and digital take-up in Colombia, 2005–2010

	2005		2006		2007		2008		2009		2010	
	No of HH ²⁰ ('000)	% of HH ²¹	No of HH ('000)	% of HH								
Terrestrial reception – of which digital*	6,805	83.4	6,823	81.2	n/a	n/a	7,293	69.7	7,212	68.8	7,483	67.5
Cable reception – of which digital	1,276	15.6	1,478	17.6	2,407	n/a	2,838	27.2	2,830	27.0	2,936	26.5
Satellite reception – of which digital	77.3	0.95	94.5 1.13	227.9	n/a	319.5	3.1	372.0	3.5	574.2	5.2	6.8
IPTV	0	0	0	0	0	0	0	0	65.3	0.62	90.9	0.82
Total	8,159	100.0	8,396	100.0	n/a	n/a	10,452	100.0	10,480	100.0	11,084	100.0

Notes: HH = households; n/a = not available. * Data not available as digital broadcasting only started in 2010

Source: Calculations based on data from ITU and National Commission of Television (*Comisión Nacional de Televisión*, CNTV)

Colombia has taken a major leap in connectivity. Internet penetration has grown rapidly, as have mobile and broadband services (see Table 4). According to a report on Argentina, Brazil, Chile, Colombia, Mexico, and Peru by the Center for Enterprise in Latin America (CELA), the Business School of Universidad de Navarra in Spain (IESE), and Everis, the multinational consulting firm, Colombia scored the highest increase in internet use between 2006 and 2007, and also in information and communication technology (ICT) expenses per capita per year, reaching US\$281.²² However, Colombia is still placed last among these countries in the Information Society Index (ISI), which means it has the poorest ICT penetration.²³

Mobile telephony has shown an even larger increase rate than pay-TV. It rose from 50.8 percent to 103.7 percent of total population, a growth of over 50 percent from 2005 to 2011.

20. Total number of households owning the equipment.

21. Percentage of total number of television households in the country.

22. IESE-CELA and Everis, *Indicador de la sociedad de la información (ISI)* (Information Society Index Report), University of Navarra, 2008, p. 37, at <http://bit.ly/hcexfh> (accessed 17 February 2011) (hereafter IESE-CELA and Everis, *Indicador*).

23. IESE-CELA and Everis, *Indicador*, p. 19.

Table 4.

Internet penetration rate (total fixed internet subscriptions as % of total population) and mobile penetration rate (total active SIM cards as % of total population), 2005–2011

	2005	2006	2007	2008	2009	2010	2011
Internet	1.5	2.0	3.1	4.4	4.9	7.2	10
– of which broadband	46.3	70.7	87.3	94.0	93.4	n/a	n/a
Mobile telephony ²⁰	50.8	68.1	76.5	91.9	92.3	95.4	103.7

Note: n/a: not available

Source: Calculations based on data from ITU and the Ministry of Information Technologies and Communications (*Ministerio de las Tecnologías de la Información y las Comunicaciones*, MinTic)²⁴

1.2 Media Preferences

1.2.1 Main Shifts in News Consumption

Since 2005, the main change in media consumption has been the increase in internet use by 21 percentage points, from 14.9 percent in 2005 to 35.9 percent of the population in 2010, according to the *Estudio General de Medios* (General Media Study, EGM), a survey covering 50 cities and towns. In 2010, as shown in Figure 4, internet consumption reached fourth place for the first time, displacing the printed press. Nevertheless, the data do not show a decline in consumption of traditional media such as printed magazines and newspapers. Nonetheless, printed media—magazines and newspapers—do not even reach 50 percent of the population. (See Figure 4.)

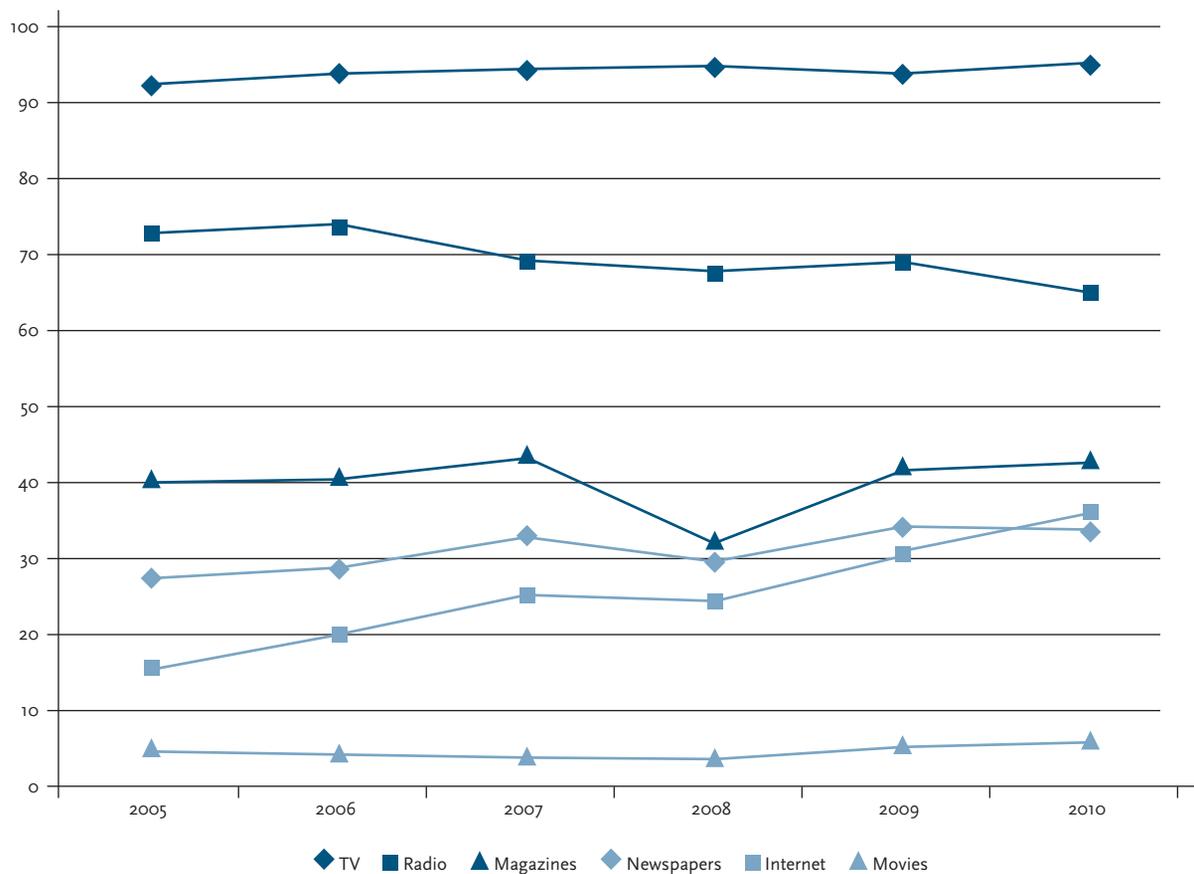
Television is still by far the most popular medium in the country in terms of consumption. Television usage stayed stable at around 94 percent of the population since 2005. The time of the day users report watching more television is the evening (93 percent in 2010), followed by midday (52 percent in 2010).²⁵ According to 2009 data, users reported watching on average 2.7 hours of national television and 1 hour of international television from Monday through Friday. During weekends, the average for national television was 2.5 hours and for international channels 1.1 hours per day.²⁶ After television, radio is the second mass media in terms of consumption. Nevertheless, as Figure 4 shows, usage decreased 12 percentage points, from 76.6 percent to 64.7 percent.

24. The source for internet penetration data in 2005–2009 was the ITU. For 2010, see MinTic, “Informe Trimestral de Conectividad” (Quarterly Connectivity Report), at <http://bit.ly/aub72Q> (accessed 12 December 2010) (hereafter MinTic, “Informe Trimestral”). For 2011, see DANE, Basic ITCs Indicators 2011 (*Indicadores Básicos TICs*), at <http://bit.ly/N9ksHV> (accessed 12 August 2012).

25. CNTV and Colombian Association for Media Research (*Asociación colombiana de investigación de medios*, ACIM), *Estudio General de Medios* (General Media Study, EGM), 2010, at <http://bit.ly/hdsVf6> (accessed 1 February 2010) (hereafter CNTV and ACIM, *Estudio General de Medios*).

26. DANE and CNTV, *Anuario Estadístico*, p. 1, at <http://bit.ly/edeYYw> (accessed 1 February 2010).

Figure 4.
Media consumption (% of the population), 2005–2010



Source: CNTV and ACIM, *Estudio General de Medios*, 2007 and 2010²⁷

As of December 2010, television broadcasting in Colombia was still analog. The National Commission for Television (*Comisión Nacional de Televisión*, CNTV) and the Ministry of Information Technologies and Communications (*Ministerio de las Tecnologías de la Información y las Comunicaciones*, MinTic)²⁸ have been leading the digitization process. In April 2012, CNTV ended operations and was replaced by the National Authority for Television (*Autoridad Nacional de Televisión*), which will lead the process of digitizing television, along with the MinTic.

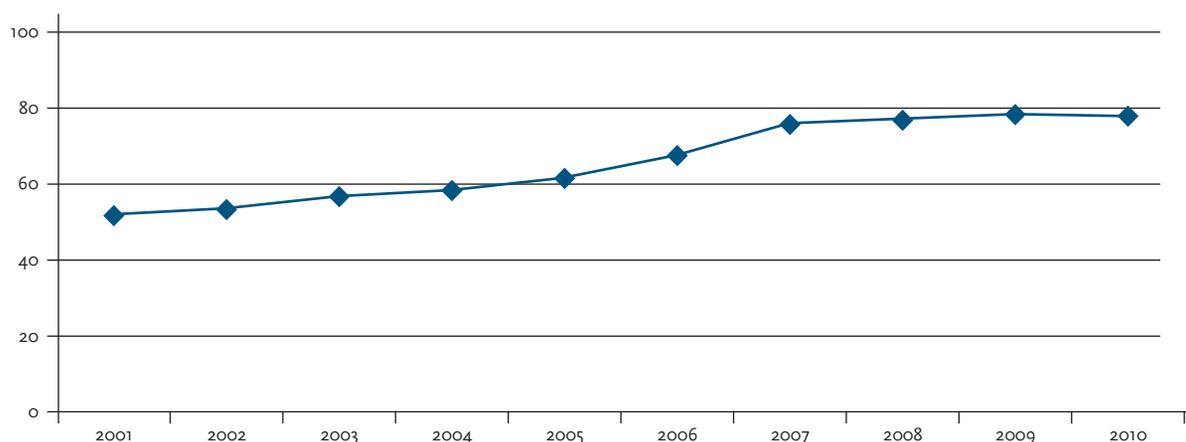
The process of broadcast digitization began in 2006 with the comparison and evaluation of three standards: the European, the American, and the Japanese. In August 2008, CNTV chose the European standard, DVB-T (see section 5.2.1).

27. CNTV and ACIM, *Estudio General de Medios*, 2007, at <http://bit.ly/f7cvFp>; 2010, at <http://bit.ly/hdsVf6> (accessed 30 November 2010). These studies use structured questions about media consumption, asking respondents to report media consumption over the last month. For years with two or three data points per year, the second point for each year was used.

28. See <http://www.mintic.gov.co>.

The first test broadcast of DTT (Digital Terrestrial Television) took place in January 2010, covering some areas of the northern and western parts of Bogotá, the capital city.²⁹ The Minister of MinTic stated in December 2010 that 25 percent of the national territory was expected to have a digital television signal by 31 December 2010.³⁰ The free-to-air private channels, Canal Caracol and Canal RCN,³¹ met this government request and their digital signal could be received in 25 percent of Colombia. By December 2011, he stated that 13 new stations would be installed and 49 percent of the total population would get the DTT signal by the end of 2012.³²

Figure 5.
Pay-TV television consumption (%), 2001–2010



Source: *Estudio General de Medios* (General Media Study, EGM) 2007 and 2010³³

As mentioned before, an important change in media consumption during the last five years is the increase of subscription television (pay-TV) (see Figure 5). From 2005 to 2010 it grew from 61.6 percent to 78 percent. This contrasts with the increase of the first half of the decade, in which pay-TV consumption grew only five points.

1.2.2 Availability of a Diverse Range of News Sources

Given the low internet penetration,³⁴ most people are still oriented towards traditional media as their main sources of news. Most online sources are online versions of traditional media, such as newspapers, television channels, and radio stations. The most visited Colombian website is Eltiempo.com, belonging to the largest

29. See <http://bit.ly/eWkeAL> (accessed 5 December 2010).

30. Radio interview with the Minister. Caracol Radio, 1 December 2010, at <http://bit.ly/hAwHUI> (accessed 8 December 2010).

31. RCN was originally *Radio Cadena Nacional* (National Radio Network), and then expanded to television.

32. See <http://bit.ly/PSkLok> (accessed 10 August 2012).

33. CNTV and ACIM, “*Estudio General de Medios*,” 2007, at <http://bit.ly/f7cvFp>; 2010: <http://bit.ly/hdsVf6> (accessed 30 November 2010). These studies use structured questions about media consumption, asking respondents to report media consumption over the last month.

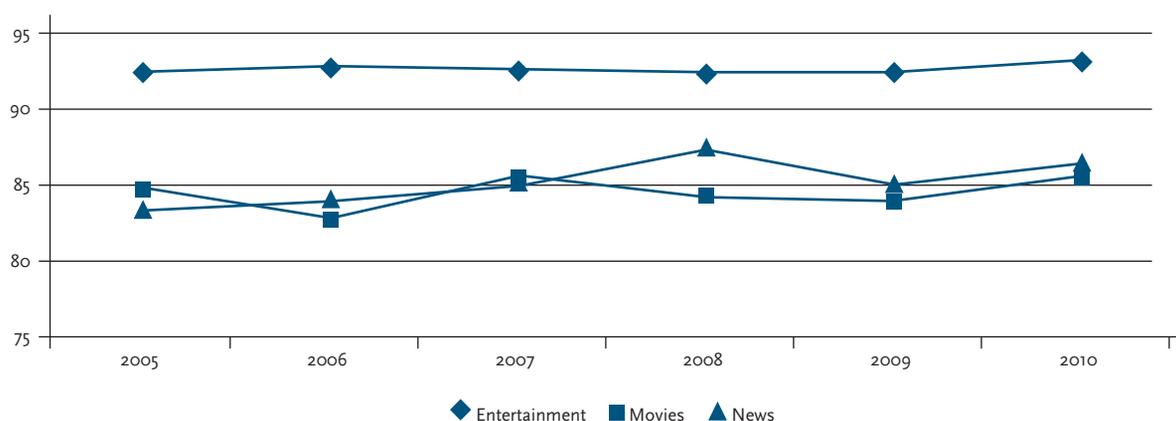
34. Fixed and mobile internet penetration by subscribers was calculated at 10 percent for 2011 (See Table 4).

newspaper in the country. However, most of these sites have developed their own multimedia content and offer different information online, mostly videos and photos that complement the written stories.

Information search is the most frequent use of the internet. In 2009, 92 percent of users reported this as their main online activity; the second most common online activity was communication, with 80.3 percent.³⁵

Most Colombians get their news from television. In 2010, news was the second most popular use of television—behind entertainment—with 86.3 percent, showing an increase of 5 percentage points since 2005 (see Figure 6).

Figure 6.
Television usage (%), 2005–2010



Source: CNTV and ACIM, *Estudio General de Medios* (General Media Study, EGM), 2007 and 2010³⁶

As a consequence of the increase of pay-TV, international channels have gained audience (from 41.8 percent in 2005 to 55.8 percent in 2010)³⁷ and may be expanding the range of news sources, at least in television, although news channels are not mentioned among the most viewed cable channels.

Another consequence of the increase of pay-TV is the appearance of privately owned cable television channels. Cable Noticias was launched in November 2007, NTN24 was launched in November 2008, and Canal El Tiempo was launched in October 2010. These three channels broadcast news 24 hours a day, a novelty in Colombian television.

35. The third most popular use is Entertainment (52.2 percent), and the fourth is Education and Learning (50.6 percent). Only 10.9 percent reported using the internet for online banking. Source: DANE. *Uso y Penetración de Tecnologías de la Información y la Comunicación en hogares y personas*, (Uses and Penetration of Information and Communication Technologies), March 2009. <http://bit.ly/bvpPU> (accessed 8 December 2010).

36. CNTV and ACIM, *Estudio General de Medios*, 2007, at <http://bit.ly/f7cvFp>; 2010, at <http://bit.ly/hdsVf6> (accessed 30 November 2010).

37. CNTV and ACIM, *Estudio General de Medios*, EGM, (General Media Study), 2007: <http://bit.ly/f7cvFp> 2010: <http://bit.ly/hdsVf6> (accessed 30 November 2010).

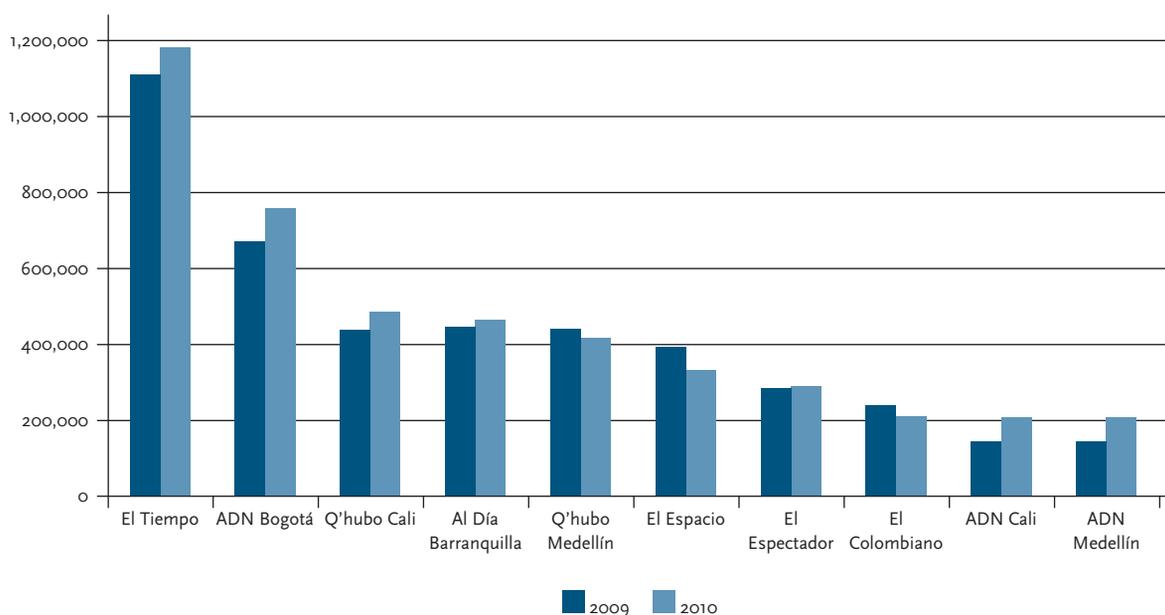
1.3. News Providers

1.3.1 Leading Sources of News

The media market is small for the size of the country and its population. There are two newspapers with national circulations and one or two regional or local newspapers per region; three national public TV channels, eight regional public TV channels, and two national private TV channels; and two main radio networks. There are also more than 650 community radio stations,³⁸ and Colombia is a pioneer country in Latin America in activism and regulation for this kind of broadcasting. However, these radio stations are not leading sources of news.

Print Media

Figure 7.
Readership of general (not specialized) newspapers, 2009–2010



Source: *Estudio General de Medios* (General Media Study, EGM), 2010³⁹

El Tiempo is by far the most widely read newspaper in the country. It is a traditional daily, founded in 1911, and has played an important role in the political and media history of the country. The second paper in terms of readership, *ADN* is a free newspaper launched in 2008 by the publisher of *El Tiempo*, Casa Editorial El Tiempo (CEET). *ADN* has regional editions in the four main cities: Bogotá, Medellín, Cali, and

38. Community radios are the third model of radio broadcasting in Colombia in addition to public and commercial stations. They are created by the communities to serve their own local interests. They are usually non-profit and their business model is based on the contribution and people's participation in content creation.

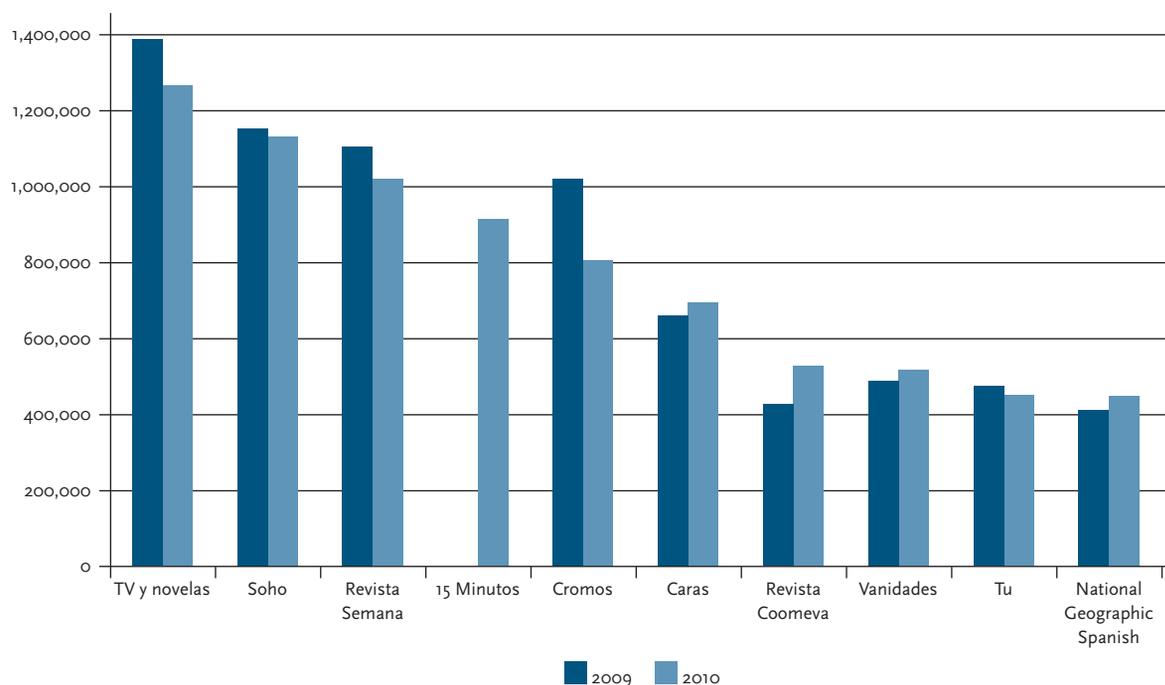
39. CNTV and ACIM, "*Estudio General de Medios*," 2010, *tercera ola* (third wave).

Barranquilla. *ADN* follows the template of *ADN* Spain, since the Spanish media group Planeta is now the majority shareholder of CEET. The next ranked newspaper in number of readers, *Q'hubo*, is sold in 15 cities, including Cali—third in the ranking—and Medellín, at fifth. (See Figure 7.)

Both *ADN* and *Q'hubo* are considered popular dailies (*diarios populares*). They focus on local information, news is presented next to large pictures, and texts are short. They do not publish extended reportages or chronicles, and lack in-depth political analysis or debate.

The fourth, *Al Día Barranquilla*, is a recently launched tabloid that circulates in the city of Barranquilla. The sixth, *El Espacio*, is a tabloid printed in Bogotá but with circulation in other cities, founded in 1965. The seventh, *El Espectador*, and eighth, *El Colombiano*, are both traditional newspapers founded in Medellín more than a century ago and represented, during the first half of the twentieth century, the political views of the two main political parties: the liberal party (*El Espectador*) and the conservative party (*El Colombiano*). *El Espectador*, founded in 1887, is Colombia's oldest newspaper. Nowadays it is printed in Bogotá and has a national circulation. *El Colombiano* is printed in Medellín and has regional circulation only.

Figure 8.
General print magazine readership, 2009–2010



Source: *Estudio General de Medios* (General Media Study, EGM), 2010⁴⁰

40. CNTV and ACIM, “*Estudio General de Medios*,” 2010, *tercera ola* (third wave).

TVyNovelas, the most widely read magazine in the country, is a biweekly gossip magazine owned by Editorial Televisa. Televisa also owns *Caras* (sixth in order, also a gossip and social commentary magazine), *Vanidades* (eighth, a women's magazine), *Tú* (ninth, a teen magazine), and *National Geographic Magazine* in Spanish (tenth). All these magazines are considered to be entertainment, without serious news content. (See Figure 8.)

In the second place is *Soho*, a men's magazine also known for its writing by famous journalists and writers. *Soho* is published monthly by Publicaciones Semana, a local publisher that owns various thematic magazines, including *Revista Semana*, a news magazine and one of the most respected investigative outlets in the country, in third place. *Semana* is a weekly and has been seen for decades as an independent outlet that has investigated and reported power-related scandals.

15Minutos, in fourth place, is a gossip magazine, and *TV Guide* is published monthly by Telmex, the biggest cable television operator. *Cromos*, in fifth place, is a biweekly news magazine owned by the Santo Domingo Group (as majority shareholder). This group also owns *El Espectador* newspaper and Canal Caracol, a private television channel.

Revista Coomeva is an institutional magazine, published by Coomeva, a cooperative that provides, among other services, loans, health services, and insurances to their associates.

Online

All the sites listed in Table 5 are the online versions of traditional media. Although most of them have developed multimedia content and offer different information online, some of them are corporate sites that provide other content besides news.

In the first place, *Eltiempo.com* is the site of the most read newspaper in the country. It not only the most popular news site, but the most visited Colombian website. *El Tiempo's* print readership for 2010 was 1.18 million people (see Figure 7) and the website traffic for April 2012 was 4.5 million unique visitors (see Table 5).

The site second in order, *CanalRCNmsn.com*, belongs to the most widely viewed private television station. *CaracolTV.com* (fourth) is the site of the second private channel. Both these sites provide news, information, and content related to all television programs, such as soap operas, contests, and reality shows. The third, *ElEspectador.com*, is the site of the second national daily. In fifth place, *Semana.com* is the site of the most important news magazine in the country. The sixth, eighth, ninth, and tenth are regional newspapers: *ElColombiano.com* from Medellín (the second city in the country) and the region of Antioquia; *ElPais.com.co* originates in Cali (the third city in the country) and the Valley region; *ElHeraldo.com.co* from Barranquilla (the fourth city in the country) and the Caribbean coast region; and *Vanguardia.com* from Bucaramanga, Santander. The seventh, *Caracol.com.co*, is the site of the main radio station of Caracol Network, that posts news and podcasts, and offers a live radio signal via the web.

Table 5.

Most visited news websites by number of monthly visitors, April 2012

Site	No. of unique visitors (users)
1 ELTiempo.com	4,500,000
2 CanalRCNmsn.com	2,400,000
3 EIEspectador.com	2,200,000
4 CaracolTV.com	1,500,000
5 Semana.com	1,200,000
6 ElColombiano.com	1,100,000
7 Caracol.com.co	1,000,000
8 ElPais.com.co	840,000
9 ElHeraldo.co	680,000
10 Vanguardia.com	570,000

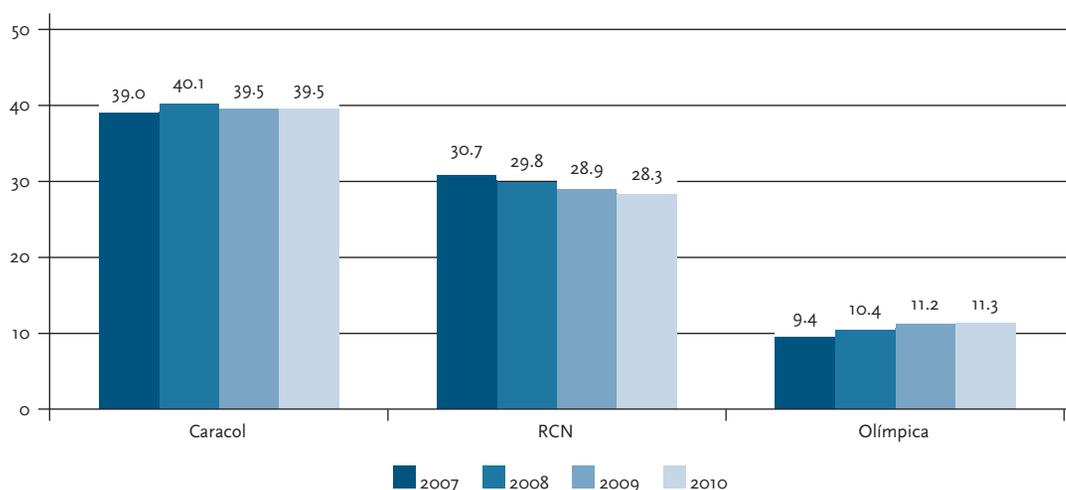
Source: Google Ad Planner

Radio

Three main radio networks control most of the radio audience in the country. Caracol, the first radio network created in the country, leads with almost 40 percent of the audience. Caracol Radio was formerly a sister network of Caracol Televisión, but it is now owned by the Spanish media group Prisa. In the second place is RCN Radio, sister of RCN Television Network, with nearly 30 percent of the audience. The third network is Olímpica, with a little over 10 percent. See Figure 9.

Figure 9.

Audience share of main radio networks (%), 2007–2010

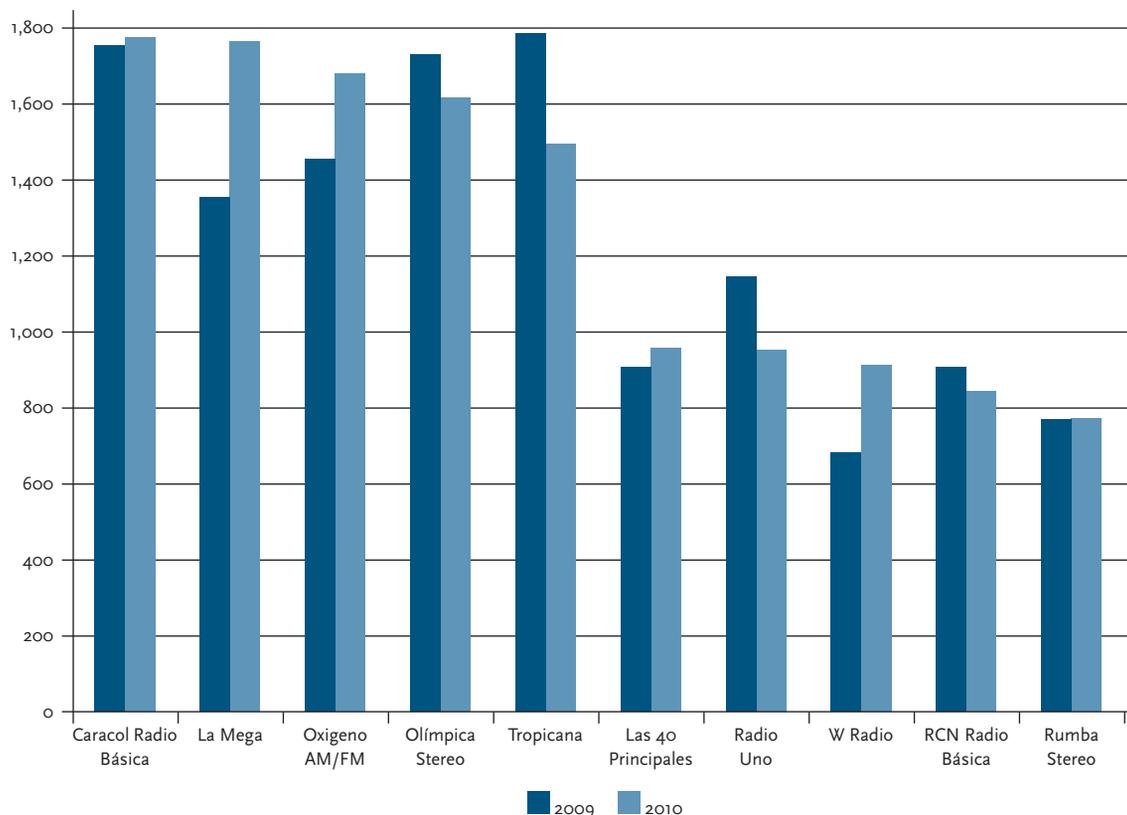


Source: “Estudio colombiano de audiencia radial” (Colombian Report for Radio Audience, ECAR), 2010

The top radio stations are in constant battle among the leading networks. Caracol Network has five stations in the top ten, and RCN has four. The first five places of the chart vary almost every quarter the report is made. The radio stations leading the chart are as follows.

Caracol Básica, the leading news station in the country, is the main radio station of Caracol Network. It is mainly a news station, but also has some segments of varieties and entertainment, and cultural programs. La Mega (owned by RCN) is a youth radio station. Oxígeno (owned by Caracol), Olímpica Stereo (owned by Olímpica) and Tropicana (owned by Caracol) are tropical music stations, and so are Radio Uno and Rumba Stereo (both owned by RCN), in the seventh and tenth positions in the chart. Las 40 principales (owned by Caracol) is a youth station. W Radio (owned by Caracol) and RCN Radio Básica (owned by RCN) are news stations. See Figure 10.

Figure 10.
Audience share of general radio stations, 2009–2010



Source: “Estudio colombiano de audiencia radial” (Colombian Report for Radio Audience, ECAR), 2010

Only three of the 10 stations on this chart are news stations. However, the two main networks also share the news stations’ audience, as in Table 6.

Table 6.
Leading radio stations by number of listeners of primetime newscasts, 2010

Station	2010
1 Caracol Radio Básica	1,041,800
2 La W	704,700
3 RCN Radio Básica	545,700
4 La FM	489,900

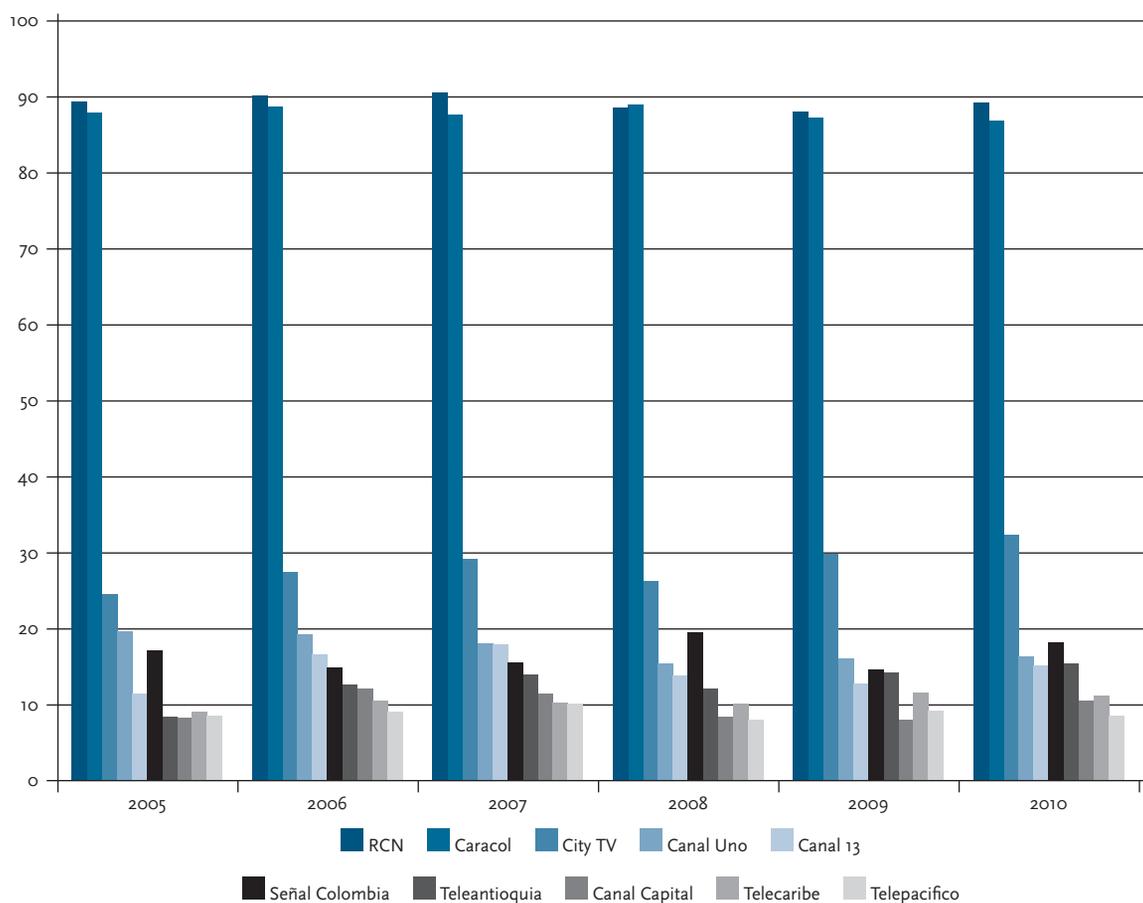
Source: “Estudio colombiano de audiencia radial” (Colombian Report for Radio Audience, ECAR), 2010

The two main radio networks lead the news prime time (from 6 a.m. to 10 a.m.). Caracol Radio Básica and La W are the news stations owned by Caracol, the leading radio network. RCN Radio Básica and La FM are the news stations of RCN Radio, the second radio network in the country.

Television

Television audiences are clearly oriented to private channels rather than public channels. As can be seen from Figure 11, the two private channels, RCN and Caracol, are dominant. Far down, the next most viewed channel is also a private local channel from Bogotá, City TV. And below these are the national public channels Señal Colombia (cultural content) and Canal Uno (mixed content). At the bottom of the figure are the regional public channels: Teleantioquia (from Medellín and Antioquia), Canal Capital (from Bogotá), Telecaribe (from Barranquilla and the Caribbean coast), and Telepacífico (from Cali and the Cauca Valley).

Figure 11.
Audience for general television channels, 2005–2010



Source: EGM 2006, 2007, 2009, 2010⁴¹

41. CNTV and ACIM, “*Estudio General de Medios*,” 2006, at <http://bit.ly/dPtKEF>; 2007, at <http://bit.ly/f7cvFp>; 2009, at <http://bit.ly/9rZ5y8>; 2010, at <http://bit.ly/hdsVf6> (accessed 13 December 2010).

1.3.2 Television News Programs

Colombians prefer private channels to be news-oriented. Twelve out of the 17 news-related television programs ranked in December 2010 were broadcast by RCN or Caracol. Between them, RCN has a larger appeal among audiences. While the most widely seen news show, “*Especiales Pirry*,” (Pirry Specials) scored 9.38 rating points, “*Septimo día*,” (Seventh Day) its direct competitor and the most widely seen show broadcasted by Caracol, reached 7.48 points (see Table 7).

Data show that Colombians prefer opinion and investigative programs rather than traditional news television magazines. The most widely seen programs of both channels, RCN and Caracol, are opinion programs that undertake their own investigations and conduct interviews or live debates about current events. They are both led by journalists and broadcast once a week at weekends. “*Especiales Pirry*” is directed by the journalist Guillermo Prieto La Rotta, known as *Pirry*, and “*Septimo día*” was created and is currently conducted by the journalist Manuel Teodoro.

Table 7.
Current events and news television programs, December 2010

	Program	Channel	Rating points
1	“ <i>Especiales Pirry</i> ”	Canal RCN	9.38
2	“ <i>Noticias RCN 2230</i> ”	Canal RCN	7.78
3	“ <i>Noticias RCN 1900</i> ”	Canal RCN	7.61
4	“ <i>Séptimo día</i> ”	Canal Caracol	7.48
5	“ <i>Noticias Caracol 1900</i> ”	Canal Caracol	6.61
6	“ <i>Noticias RCN 1230</i> ”	Canal RCN	5.13
7	“ <i>Noticias Caracol 2230</i> ”	Canal Caracol	4.68
8	“ <i>Noticias Caracol 1230</i> ”	Canal Caracol	4.29
9	“ <i>Entre ojos</i> ”	Canal Caracol	3.23
10	“ <i>Claramente</i> ”	Canal RCN	3.07
11	“ <i>La noche de RCN</i> ”	Canal RCN	2.88
12	“ <i>El Radar</i> ”	Canal Caracol	2.29
13	“ <i>CM & La Noticia 2130</i> ”	Canal 1	1.45
14	“ <i>Noticias Uno</i> ”	Canal 1	1.32
15	“ <i>Agenda CM&</i> ”	Canal 1	0.67
16	“ <i>Pregunta Yamid</i> ”	Canal 1	0.51
17	“ <i>Telepaís</i> ”	Canal 1	0.18

Source: Prepared by reporters on the basis of data from IBOPE, 2010

As mentioned before, RCN and Caracol capture almost all the audience. Among the top nine most watched television news programs, only three are broadcast by the public channels and their ratings seem insignificant (less than two rating points). The top three programs are broadcast by private channels: the RCN newscast at

10 p.m. is the most widely seen, followed by the RCN newscast at 7 p.m., and in the third place, the Caracol newscast at 7 p.m. Data reveal that most Colombians prefer the evening (7 p.m.) or night (9:30 p.m.–11 p.m.) programs, rather than the early morning or noon times. See Table 8.

Table 8.
Television news programs, December 2010

	Program	Channel	Rating points
1	"Noticias RCN 2230"	Canal RCN	7.78
2	"Noticias RCN 1900"	Canal RCN	7.61
3	"Noticias Caracol 1900"	Canal Caracol	6.61
4	"Noticias RCN 1230"	Canal RCN	5.13
5	"Noticias Caracol 2230"	Canal Caracol	4.68
6	"Noticias Caracol 12:30"	Canal Caracol	4.29
7	"CM& La Noticia 2130"	Canal 1	1.45
8	"Noticias Uno"	Canal 1	1.32
9*	"Telepaís"	Canal 1	0.18

Note: *Although there are more news programs in the country (mostly regional), the IBOPE ranking considers only nine of them
Source: Prepared in house based on data from IBOPE, 2010

1.3.3 Impact of Digital Media on Good-quality News

Most Colombian newspapers maintain websites and over the past years have made efforts to start using Web.2.0 tools to provide information. They have included video, audio, blogs, surveys, and walls of comments to their editions and have opened Facebook and Twitter accounts to keep their audience up-to-date minute by minute. No newspaper has yet abandoned their printed edition to go exclusively online, but there are new entrants, such as LaSillaVacía.com, created exclusively for the web, which is a novelty. LaSillaVacía.com was launched in March 2009 as an independent with no connections with the political elite. (On media ownership, see section 6.) It has had great success and recognition (particularly among the young and urban population) because it provides reliable information and investigative journalism stories. It has an average of 76,000 monthly unique visitors.⁴²

Traditional newspapers like *El Tiempo* and *El Espectador*, that have been printing and circulating their editions for many years, have made big efforts to better understand the challenges in the new media era and have changed their ways of providing information. *El Tiempo*, for example, despite being the most popular newspaper in both printed and online editions, recently launched a new design and its own cable television news channel. The printed edition is now more colorful, and has larger photos and shorter articles. According to the general director, Roberto Pombo, the new design "fits better with current and future readers."⁴³ The online edition includes multimedia content and is constantly updated.

42. Google AdPlanner, at <http://bit.ly/fGwrRE> (accessed 17 May 2012).

43. Roberto Pombo, "Carta del director de *El Tiempo* sobre el Nuevo diseño" (Letter from the director of *El Tiempo* about the new design), at <http://bit.ly/eXtUwM> (accessed 13 December 2010).

However, these new dynamics, especially the instantaneity of the internet, may threaten journalistic quality. Magazines such as *Semana* used to publish weekly and now market competition has forced them to provide daily updates of their online editions in order to keep their audience. Cesar Paredes, politics editor for *Semana.com*, has said that immediacy may encourage misinformation and reduce quality in terms of providing context and diverse points of view by source diversity, because many news items published online have only one source of information.⁴⁴

According to some of the journalists interviewed, some other digital tools (such as walls for comments) that have been implemented on almost all the sites have become burdensome due to the difficulty of reviewing and ensuring that no rude language or personal threats are posted. They might work as an open field for discussion but they can also be an outlet for rage and negative behavior.

1.4 Assessments

The impact of digitization on the news offer is still low. Although internet consumption has grown in the past years, analog television is still by far the main source of news for Colombians. However, the impact of digitization on news offer seems to be increasing fast: on the one hand, many traditional media that now have online versions are providing new content in multimedia formats. On the other hand, some new online media have been born in the last years and have gained recognition and respectability as serious and good-quality news providers. Such is the case of *LaSillaVacía.com*, created by an experienced political journalist in 2009. This example points to an important characteristic of internet use in the country: although it is low in rural areas, it is increasing very fast in urban areas and higher socio-economic groups. A 2010 survey among opinion leaders showed that *LaSillaVacía.com* was their fourth most read publication and the third in Bogotá (the capital city), even over *Revista Semana*, the most traditional political printed magazine.⁴⁵

The perspective for online media is optimistic since, considering the big gap in internet penetration between rural and urban areas in the country, the government has recently announced an ambitious plan to improve digital literacy and reduce the digital divide by 2014. The MinTic aims to: reach 50 percent of households and small and medium-sized enterprises (SMEs) with internet access; multiply fourfold the total number of internet connections; and triple the number of cities and towns connected in the country.⁴⁶ (See also section 7.4.)

As mentioned above, another important change registered during the last few years is the increase of cable and pay-TV. Considering the pre-eminence of television in Colombian media consumption, it is possible to say that cable television is becoming an additional source of information not only for news, but also for other

44. Interview with Cesar Paredes, journalist and online politics editor for *Semana.com*, Bogotá, 26 November 2010.

45. Cifras y Conceptos, “*Panel del Opinión*” (Opinion panel), 2010, at <http://bit.ly/6T3Hsr> (accessed 18 December 2010) (hereafter Cifras y Conceptos, “*Panel del Opinión*”).

46. MinTic, “*Plan Vive Digital*” (Live Digital Plan), October 2010, at <http://bit.ly/cr8yhM> (accessed 18 December 2010).

topics, such as documentaries, popular science, technology, and history, as the Discovery Channel is reported to be the most viewed channel in pay-TV.⁴⁷ However, this is not necessarily an effect of digitization.

Local operators have also taken advantage of the pay-TV market increase. During the last five years, the news offer has been enriched by the launching of three new 24-hour news channels.⁴⁸

47. CNTV and ACIM, “*Estudio General de Medios*,” 2010, *segunda ola* (second wave), at <http://bit.ly/hdsVf6> (accessed 8 December 2010).

48. As mentioned in section 1.2.2, these channels are CableNoticias (2007), NTN24 (2008), and Canal El Tiempo (2010).

2. Digital Media and Public or State-Administered Broadcasters

2.1 Public Service and State Institutions

2.1.1 Overview of Public Service Media; News and Current Affairs Output

Colombia's public service media are state-supported television channels and radio stations that are regulated by the National Agency of Television (*Agencia Nacional de Televisión*, ANTV) and the national broadcaster RTVC, and whose mission is the strengthening of the nation's cultural values.

The public media sector comprises three national television channels, eight regional television channels, one international television channel, two national radio stations, and over 150 public interest stations (see section 1.3.1). Also, there are some 650 community radio stations and 40 community television channels, whose owners must pay an operational license fee to the state.

As to public radio, the two national stations are Colombian National Radio (*Radio Nacional de Colombia*, RNC) and *Radiónica*. The RNC station has been operating since 1940, some 14 years before the arrival of television, and has maintained its popularity as an educational and cultural news station. *Radiónica* was created in 2005, as a sister to RNC, aimed at young audiences. It has become very popular among music stations, and recently gained an important space in the social networks: it has 30,000 followers on Twitter, the highest number among public media. In addition, there are around 150 public interest radio stations (*Emisoras de Interés Público*, EIP) that do not have national coverage as they are meant to broadcast for specific regions and communities. According to their mission, they are classified in five groups: police stations, army stations, mayoralty (*municipal*) stations, indigenous stations, and university stations. The 650 community radio stations serve mainly local interests. They might be considered as an important source of news by a specific group of people, but they are not that relevant in public debate.

There are three national channels, eight regional channels, and one international channel in public television. The three national channels whose signal has national coverage are Señal Colombia, Señal Institucional, and Canal 1. The eight regional channels are Canal Capital, Telecaribe, Telepacífico, Teleantioquía, TeleCafé, Teleislas, Canal Tro, and Canal 13. They are classified as regional channels because their signal has a limited

coverage (each region produces and broadcasts its own signal). There is one international public channel, Región Colombia Institucional (RCI), intended for Colombian expatriates around the world.

Law 182, known as the television law, began regulating the public television service in 1995. It is perhaps the most important law regarding the management, control, operation, and access to the television service since the advent of television in Colombia in 1954. According to this law, television is a public service subject to the ownership, reserve, control, and regulation of the state and its purpose is to educate, inform, and entertain, in an objective, truthful, and healthy way. It seeks to meet the social goals of the state, to promote respect for the guarantees, duties, and rights and freedoms, strengthen democracy and consolidate peace, and foster the dissemination of human values and cultural expression at national, regional, and local levels.⁴⁹

Since 1995, all the public television channels have been controlled by the National Commission for Television (*Comisión Nacional de Televisión*, CNTV), which has now become the National Authority for Television (*Autoridad Nacional de Televisión*, ANTV), a state organ with administrative autonomy and independence. Among its several functions, the most important are: the implementation and development of general policy for the television service; the inspection, surveillance, monitoring, and control to ensure the adequate provision of public service television; classification of the various forms of public service television, and regulation of its conditions of operation and exploitation; regulation of the granting and renewal of operation licenses, the allocation, assignment, and use of frequencies, and the establishment of charges and fees to be received from the granting and exploitation of the concessions for the operation of television service.⁵⁰

Since 1963, the Radio and Television National Institute, Inravisión, managed the programming, production, and operation of public media. In 2004, under Alvaro Uribe's presidency, Inravisión was shut down due to a financial crisis and replaced by a new organism called National Radio and Television of Colombia (*Radio Televisión Nacional de Colombia*, RTVC), regulated by CNTV and now by ANTV.⁵¹ Since then, RTVC has been in charge of the creation, production, and transmission of public television and radio.

Neither national public radio nor national public television has reached 100 percent coverage. By 2010, radio signal coverage reached 94 percent of the population,⁵² while television signal reached 92 percent.⁵³

Public media are not the most relevant source of news for Colombians; they are more focused on carrying educational and cultural information than news. As shown in Figures 9 and 11, private television channels and private radio stations are by far the most popular news providers.

49. Law 182, 2005 at <http://bit.ly/gWd7Ir> (accessed 10 August 2012).

50. On CNTV, see <http://bit.ly/gWd7Ir> and for ANTV see <http://bit.ly/RNdGwC> (accessed 20 May 2012).

51. See <http://www.rtv.gov.co/>

52. RTVC, "*Recuperación y expansión de estaciones*" (Recovery and Expansion of Stations), at <http://bit.ly/gVzqtL> (accessed 2 April 2011).

53. Cuayal Muñoz and Jesús Eduardo, "*Impacto de la Inversión Estatal en Televisión Pública, Nivel Nacional, Regional y Comunitario*" (Impact of State Investment in Public Television, Nationwide, Regional and Community), Contraloría General de la República, 2009, p. 5, available online at <http://bit.ly/eP82RJ> (accessed 20 May 2012).

2.1.2 Digitization and Services

It is still early to define changes in public channels as digital broadcasting has not yet begun. However, according to Salua Abisambra, chief of the CNTV Content Office, there will not be a significant increase in the amount and diversity of content and public channels programming will not change drastically.⁵⁴ Nonetheless, since channels can decide whether or not to implement the multichannel functionality of DTT, they can also benefit from other applications, such as interaction with the audience through a data channel, or getting international channels to be broadcast through open television.

On the internet, RTVC has taken advantage of the opportunities of the digital era to create new communication spaces to connect with its audience. It maintains a multiservice website with live video streaming for both national television channels and live audios for radio stations. It offers news about media events, information about signals and programming, service statistics, a coverage map, and technical support. It also features a “Citizen section” with chats, forums, and boxes displaying the real-time activity of their Twitter and Facebook accounts.

All public television channels, except for Canal 1, have websites that provide several digital services. Telepacífico and Telecaribe, the channels that broadcast for the two coastal regions—the Pacific Ocean on the west border of the country and the Caribbean Ocean in the north border—offer a programming guide, chats, forums, and a “Question of the day” section. Telepacífico offers also live streaming, photo and video galleries, and links to Facebook and Twitter accounts. Canal Tro, which broadcasts for the central northern part of Colombia, includes all the digital services mentioned above as well as live video streaming for the regional lottery draw. TeleAntioquía and Telecafé, the channels that broadcast to the central northwestern region of the country, offer live video streaming, previews, online surveys, video libraries, and links to several social networks and platforms such as Vimeo, Flickr, JumpTv Latino, YouTube, Facebook, and Twitter. TeleIslas, the channel that broadcasts for the country’s insular territories in the Caribbean (San Andrés and Providencia), has the simplest website (Teleislas.com.co), which includes only a programming guide and general information about the channel (there are no interactivity tools or online participation is not allowed). The national channels, Señal Colombia and Institucional, have perhaps the most sophisticated websites, including digital tools for channel programming and other citizen services, such as driver license and identification forms and requirements, a tax calendar, and job offers.

For radio, *Radiónica* has a website (Radionica.gov.co) with live video streaming and a multimedia gallery with a free download option where music videos, artists’ images, and podcasts are available. It offers also a chat option, a forum, a “Question of the day” section, and an online song request selection.

2.1.3 Government Support

Before the creation of CNTV, public media depended directly on the national government and the national budget.⁵⁵ Since the establishment of Law 182 of 1995 and the creation of the Television Development Fund

54. Interview with Salua Abisambra, chief of the CNTV Content Office, Bogotá, 10 February 2011.

55. Public media as state supported media. Community service is not included.

(*Fondo para el Desarrollo de la Televisión FDTV*), there is a self-sustained business model that allows public media to be financed with the money that private media pays for the operation, use of the spectrum, and other fees.⁵⁶ According to the law, the FDTV is a special account meant to strengthen the public television service and its cultural programming. It is administered by the CNTV and its beneficiaries are RTVC and the regional channels.

CNTV's budget comes from three different fees (paid by private media):⁵⁷ 46 percent from the concession of the electromagnetic spectrum, 25 percent from the exploitation or usage fee (1.5–10 percent over gross income), and 2 percent from the frequencies usage fee. The additional 27 percent comes from other types of income, such as financial yields, interests, sanctions, channel name registration. Between 1996 and 2008 CNTV's income reached in aggregate US\$1 billion,⁵⁸ generated as follows: 27 percent from national private television, 27 percent from other income, 21 percent from concession spaces, 18 percent from subscription television, 5 percent from satellite television, and 2 percent from local television. All of RTVC's operational budget comes from CNTV's resources.

Since the CNTV is an independent entity designated by the state to manage the television industry in Colombia, there is no evidence of additional or direct state support for the public media digitization process. CNTV, which is also in charge of the management of the FDTV's budget, has been leading the process since the beginning. In partnership with RTVC, it has developed the strategies to ensure that public national and regional channels can successfully switch to the digital signal.

Since 1996, the CNTV has—through the FDTV Fund—invested an amount close to US\$850 million, equating to an average of US\$65 million per year, on strengthening public analog media.⁵⁹ In 2008, for instance, the management of public television in Colombia executed a budget of about US\$80 million, invested as follows: US\$12 million in CNTV, US\$17 million in payments to retired workers of former Invisión (see section 2.1.1), and US\$51 million to the FDTV Fund. The Fund divided the budget as follows: US\$25 million for the technical infrastructure of the national public network and public television channels, US\$14 million dollars for programming and operation of RTVC and US\$12 million for the programming and production of regional channels. This means that less than 50 percent of the budget for public television is invested in producing television, and the largest part of the resources is invested in technical operation and management.

56. Law 182 of 1995, at <http://bit.ly/f60ikc> (accessed 1 April 2011).

57. According to the law, every operator must pay for the access, use, and exploitation of the electromagnetic spectrum.

58. Income 1996–2008, US\$ 1,043,544,256. CNTV, “*Evento Público Internacional del Consejo Consultivo de Radio y Televisión del Perú. Modelo de la Televisión en Colombia*” (International Public Event of the Advisory Council of Radio and Television of Peru. Model of Television in Colombia), Lima, 25 June 2009, p. 17, at <http://bit.ly/eOXbjs> (accessed 9 February 2011).

59. Omar Rincón, “Colombia,” in *Libro Blanco sobre la Tv Educativa y Cultural en Iberoamérica*, (White Book on Educational and Cultural Television in Ibero-America), Tornero Pérez, Manuel José and Lorenzo Vilches (coordinators), Gedisa, Barcelona, 2010. p. 125 (hereafter Omar Rincón, “Colombia”).

2.1.4 Public Service Media and Digital Switch-over

Years before the election of the DTT standard, the state began making efforts to prepare public television for digital requirements. Between 2005 and 2008, CNTV conducted a technological renovation that included the adjustment, grant, and installation of new equipment, and the renewal of infrastructure for the national and regional channels. After the choice of the DVB-T standard in August 2008, CNTV approved almost US\$2 million for RTVC to build the first digital transmission station in the country (meant to cover five departments of the central part of the country) and approved another US\$2.5 million to set up other stations over the country.⁶⁰ Not all regional channels are digitized and the digital network has not yet been installed. According to Juan Andrés Carreño, former director of CNTV, there is a budget of US\$2 billion to create the digital network for the regional channels.⁶¹

The radio service has also implemented a digital strategy to achieve a suitable technical infrastructure. In 2009, a provisional contract was signed with RNC for the installation and integration of a digital console system that improved the service and its national coverage. In 2009 and 2010, coverage grew by 20 percent, reaching 90 percent of the population.⁶²

2.2 Public Service Provision

2.2.1 Perception of Public Service Media

There is widespread agreement about the importance of public media for strengthening the democratic values of the nation and for reinforcing the education, culture, and identity of Colombians. However, this important role has not been properly realized. At the same time, there are public complaints about CNTV's performance and how the public media compete against private—and the most popular—media.

The law has historically protected public media, yet these policies have not been successful in terms of popularity and audience. According to Omar Rincón, journalist, television expert, and Associate Professor at Universidad de los Andes, the low ratings of public media can be explained by three main factors: first, the lack of marketing and advertising of public broadcasting programming; second, the inability to understand viewers' habits and tastes; and third, the complexity and seriousness of public media storytelling.⁶³ Since CNTV has not established a marketing strategy to promote public media, most Colombians are unaware of the public channels' content and schedules. Because public media do not consider viewers' pre-established watching habits, they feel uncomfortable with the content offer. In addition, the lack of creativity and imagination to produce cultural and educational content has kept audiences away.

60. CNTV, "*Plan de desarrollo 2010–2013*" (Development Plan 2010–2013), p. 45, at <http://bit.ly/dfwPyg>. (accessed 10 February 2011).

61. RTVC, "*Lanza primera transmisión digital de televisión*" (Launch of first DTT signal), 22 August 2010, at <http://bit.ly/f2CY2P> (accessed 5 February 2011).

62. RNC, at <http://bit.ly/hdfY3J> (accessed February 2011).

63. Omar Rincón, "Colombia."

There are also some critics of the politicization of public media. German Yances, Chair at Universidad Javeriana, states that “as governors of departments, including the President of the Republic and the national government have shares or own regional public channels or national public channel, that affects the content and administration of these channels.”⁶⁴

Mauricio Mosquera, manager at Tele Medellin, a local TV channel, agrees with Mr Yances that public media can be considered as governmental. He believes there will always be a link between public media and the government, so the challenge is to ensure that the public media become participatory, creative, and inclusive, and that they work within very strict ethical parameters. He also states that media should be very close to the people. Despite their dependence on the government, they can strive to belong to citizens as well.⁶⁵

Recently, with the advent of digital technology, debate and analysis on the role of public media have become stronger. The state recognizes that public media must catch up with technology, and it has proposed several plans to modernize the infrastructure, equipment, and signal access and coverage. RTVC, for example, stated that its goal for 2011 was to be a “leader in the domestic television, radio and new media market, a model of effectiveness at the regional level, with the ability to make technical and financial decisions, with national coverage and dissemination of our cultural diversity abroad, through which the State will guarantee an entertaining, educational, cultural, and institutional programming, of common interest and will promote interactive communication with citizens.”

In 2012, several shows, films and documentaries produced or co-produced by RTVC received nominations and prizes on national and international awards. “*Totó*” and “*La Lleva*” won the India Catalina award for best children’s program show category, while “*Guillermína y Candelario*” was chosen for the Prix Jeunesse International. The documentary “*Nacimos el 31 de diciembre*” (Born on 31 December) won the First Biennial of Contemporary Continental Indigenous Arts, and the film “*Nacer*” (Birth) competed in film festivals in Peru, Sweden, Kosovo, Ecuador, Spain, and Uruguay.⁶⁶

There are no specific studies of audiences’ perception of public service media. But public television channels have low ratings. According to EGM 2010, in one month regional public channels scored 50.1 rating points and national public channels scored 27.7 points.⁶⁷ This means they were the third and fourth most preferred television option after the private channels, which reached 97 rating points, and closed television (pay-TV) channels, which scored 78.1 points.

64. German Yances, “*La experiencia colombiana en medios públicos*” (The Colombian experience in Public Media), at <http://bit.ly/e4pyL7> (accessed 4 April 2011) (hereafter “*La experiencia colombiana*”).

65. “*La experiencia colombiana*.”

66. More awards and nominations at <http://bit.ly/MrHJHn> (accessed 13 August 2012).

67. CNTV and ACIM, “*Estudio General de Medios, tercera ola*, 2010, p. 13, at <http://bit.ly/cHJfKg> (accessed 7 April 2011).

Public radio stations have also little popularity. In the top 30 most listened to stations in Colombia in 2010, there were only two public radio stations listed: *Radio Policía Nacional*, in the 19th position and *Radiónica* in the 29th position.⁶⁸

2.2.2 Public Service Provision in Commercial Media

The television regulatory framework of 1995 also established and reinforced several public service obligations for commercial media.⁶⁹ Since that date, decrees have regulated the allocation of frequencies and state intervention in television, and the schedules for children, youths, and adults, among others. It is important to note that there are no specific obligations for the provision of news.

Here a list of the most significant obligations:

- National operators are obliged to broadcast a minimum of 108 hours of children's programming, 60 hours of youth content (for young people aged 12 to 18 years), and 60 hours of content of opinion every three months.⁷⁰
- Free access for legislative chambers to broadcast television services. They will have a space of 30 minutes in prime time.
- All channels must report daily, between 7 p.m. and 10 p.m., the mechanisms available to receive feedback, comments, requests, and complaints about scheduling or performance.
- All television channels, public and private, have the obligation to broadcast a news ombudsman (*Defensor del televidente*) program. These shows present the complaints, opinions, and suggestions concerning language, contents, schedule of the shows, and unsuitable topics for children, among other things. They are broadcast weekly at a late hour, usually after midnight.
- Each channel must broadcast, each day, 15 minutes of institutional messages from state agencies, five minutes from 12 p.m. to 6 p.m. and 10 minutes from 7 p.m. to 10 p.m.
- Institutional spaces are allocated to political parties and movements according to government decisions and needs, such as electoral campaigns.
- Institutional spaces allocated to consumer associations recognized by the law will be broadcast from Monday through Friday, at the times and for a duration determined by the board of directors of CNTV.
- Institutional spaces allocated to the Colombian Family Welfare Institute (*Instituto Colombiano de Bienestar Familiar*) will have a maximum of one minute's duration and will be broadcast from Monday through Friday between 8:30 p.m. and 9 p.m.
- The president may use the television services at any time and without limitation in order to address the nation.

68. "Estudio colombiano de audiencia radial" (Colombian Report on Radio Audience, ECAR), 2010.

69. Law 182 of 1995, at <http://bit.ly/f60ikc> (accessed 1 April 2011).

70. According to article 33 (Agreement No. 2, 2011 //Law 182 of 1995). See <http://bit.ly/QvLO9F> (accessed 11 August 2012).

2.3 Assessments

Public media have benefited in many ways from the digitization process. The renewal of the infrastructure and equipment and the improvement of the signal coverage are among the most important gains. The implementation of radio and television websites is seen also as a gain, especially for audiences that have acquitted more tools to be informed with and entertained. Also, thanks to live video streaming and live audios, people do not need a television set to watch television, or a radio set to listen to the radio. Because of the computer, people without any of these devices, or those who live in non-covered areas, can listen and watch the public media programs, and they can do so more than once, without relying on a specific schedule.

Given the fact that the number of channels will increase once the DTT is implemented, the programming grid will expand and producers will have the opportunity to develop new content and digital tools. According to the journalist and Univisión news director Daniel Coronell, the supply of more information necessarily has a positive effect on audiences, because “a better-informed society is a society able to make better decisions.”⁷¹

On the other hand, public media may also be affected by digitization. The change in equipment and the implementation of digital networks for public channels, especially for the regional channels, necessarily requires a large investment of money that might delay the process, putting the public media at a disadvantage compared with private channels whose budget does not depend on state funding.

The eagerness to improve the technological level can affect the quality of the content. According to media analyst Omar Rincón, digitization is making Colombian media worry more about design and technology than about the quality of information.⁷² Most regional small newspapers have implemented websites that offer the same information as the print version with a more modern and colorful design.

The change in the narrative is one of the most crucial challenges for public media. Digital experts agree that digital storytelling works differently and content should be presented in new ways. Several media enterprises have migrated their content to websites but they have not incorporated new narratives. They have not fully integrated the digital tools into the journalistic process, and little attention is still paid to audiences as news producers. This is the case for most of the regional print media that face the digital take-up with economic and technical disadvantages in comparison with national media like *El Tiempo* or *El Espectador*.

The digitization process is still beginning in Colombia, but this focus on technology and lack of attention to content provision can be seen as a negative aspect—and an opportunity that looks likely to be lost. The success of digitization will depend on discovering how to use the opportunities offered by technology to provide content that truly educates and reinforces public values and culture.

71. Interview with Daniel Coronell, journalist and Univisión news director, Bogotá, 18 December 2010.

72. Interview with Omar Rincón, media analyst, Bogotá, 22 December 2010.

According to the Constitution, the electromagnetic spectrum is a national resource and in order to promote public interest, several obligations must be imposed on all media, including commercial ones.⁷³ In Colombia, it is of great importance that not only public broadcasters make efforts to have a television that serves the audiences' needs. As mentioned before (see section 2.2.2), several public policies have been established to guarantee this. It is important to note that, in contrast with other Latin American countries, public media have been strengthened in recent years and public service provision is considered an important issue.

However, some analysts agree that, considering the educational and cultural value of public media in Colombia, it is urgent to review and rethink the duties and obligations of public television, specially facing the DTT transition. Although a big content expansion is not expected, public television should be, for example, the window for independent production and the driving force for the development of an independent industry. But the sector's development is being driven by private channels, more focused on the business than on public interests (see section 6). Also, there is a pending discussion about the content provision for public television. The question is how to provide good-quality content that serves the public interest while being able to compete with the private channels.

73. Political Constitution of Colombia, at <http://bit.ly/cGrE8r>. See Art. 75.

3. Digital Media and Society

3.1 User-Generated Content (UGC)

3.1.1 UGC Overview

The list of the 10 most visited online destinations in Colombia is topped by foreign sites. Facebook is by far the most visited site in the country, with 19 million unique visitors each month.⁷⁴ As in many other countries, this social network quickly gained a huge popularity that seems impossible for any local site to match. See Table 9.

Following Facebook.com are Live.com, Youtube.com, Msn.com, and Yahoo.com, all of which appeal to a broad range of audiences and provide multiple services, such as email, photo sharing, embedded video, chats, blogs, and news feeds.

Table 9.
Top 10 most popular sites by number of unique visitors, April 2012

	Site	Unique visitors (million)*
1	Facebook.com	19
2	Live.com	17
3	Youtube.com	16
4	Msn.com	13
5	Yahoo.com	9.1
6	Blogspot.com	6.8
7	Wikipedia.com	6.7
8	Iminent.com	6.1
9	Microsoft.com	5.6
10	Ask.com	3.8

Notes: * Unique visitors (estimated cookies). Google.com is not ranked by Google Adplanner

Source: Google Ad Planner data for April 2012⁷⁵

74. Google Ad Planner Statistics for April 2012, at <http://bit.ly/ha1G7K> (accessed 5 January 2011).

75. See <https://www.google.com/adplanner> (accessed 30 April 2012).

The list of the 10 most visited UGC sites is also topped by foreign sites. Facebook is both the most visited site (see Table 10) and the most visited UGC site. It has a privileged position with 19 million visitors (estimated cookies) per month, 2 more million than Live.com, ranked in the second position. It is followed by Youtube.com, one of the most popular sites for video sharing around the world. Below the fourth place, the number of unique visitors per site decreases significantly, with fewer than 10 million visitors.

It is worth mentioning the ranking of Twitter.com in 10th position. Considered to be a social network and a microblogging website, it is not yet very popular in Colombia. In spite of the increase shown in 2009, when the Spanish version was launched, it still has a low penetration.⁷⁶ However, different online surveys agree that the number of Latin American Twitter users, including Colombians, continues to grow at a very high rate (achieving 736 percent growth in the first year),⁷⁷ and it will gain major popularity in the near future.

The comments wall is perhaps the most popular tool out of the UGC applications in Colombia. In Eltiempo.com and in most news sites, long lists of comments can be found under the articles, mainly those related to politics. Around 2004 and 2005 blogs became very popular among internet users in Colombia. In recent years, many online versions of traditional media have created their own blogs sections.⁷⁸ At the beginning they invited well-known people to blog. Recently, it has become common to find media bloggers who are citizens with an expertise or interest in some particular topic (some of them already well-known in the local blogosphere), who are not paid. This represents a change in news and content offerings, and in audiences' and citizens' roles in relation to the media as well. Besides the "official" bloggers, ordinary people can give their opinions in Eltiempo.com, but they cannot share their own stories, photos or videos.

Table 10.
Top 10 most popular UGC sites by number of unique visitors, April 2012

	Site	UGC category	Unique visitors (million)*
1	Facebook.com	Social network	19
2	Live.com	Web portal	17
3	Youtube.com	Video sharing	16
4	Msn.com	Web portal	13
5	Yahoo.com	Web portal	9.1
6	Blogspot.com	Blogging resources and services	6.8
7	Iminent.com	Clip Art resources	6.1
8	Ask.com	How-to, DIY, and expert content	3.8
9	Wordpress.com	Blogging resources and services	2.4
10	Twitter	Micro-blogging and messaging	2.4

Note: * Unique visitors (estimated cookies)

Source: Google Ad Planner data for April 2012⁷⁹

76. According to the Semiocast 2012 report, Colombia has an estimated 6 million twitter accounts and ranks 14th among the top tweeting countries. See <http://bit.ly/yobMJk> (accessed 10 August 2012).

77. Mauricio Jaramillo, "Twitter en español creció 736 en su primer año" (Twitter in Spanish grew 736 percent in its first year), at Enter.co, at <http://bit.ly/9gM4Nz> (accessed 15 January 2011).

78. See <http://www.eltiempo.com/blogs> and <http://blogs.elspectador.com/> (accessed 11 August 2012).

79. See <https://www.google.com/adplanner> (accessed 12 May 2012).

3.1.2 Social Networks

Social networks have become widely popular in Colombia. The top 10 social networks list aggregate over 20 million unique visitors each month.⁸⁰ Facebook.com and Taringa.net (first and second positions) are followed by Scribd.com, a document-sharing website based in the USA. It defines itself as the world's largest book club, where people can upload, organize, and distribute documents on the web and mobile devices. Below sixth place, the number of unique visitors per site is around half a million and less each, not very significant when compared with the largest networks. See Table 11.

Table 11.

Top 10 most popular social networks in Colombia, April 2012

	Social network site	Unique visitors (million)*
1	Facebook.com	19
2	Taringa.net	1.9
3	Scribd.com	1.6
4	Sonico.com	1
5	Linkedin.com	0.83
6	Fbcdn.net	0.43
7	Twoo.com	0.43
8	Hi5.com	0.24
9	Pizap.com	0.24
10	Psicofxp.com	0.18

Note: * Unique visitors (estimated cookies)

Source: Google Ad Planner data for April 2012

3.1.3 News in Social Media

There are no official statistics on Colombians' activities on social networks or blogs. However, there are data on the most visited sites that indicate people's preferences on the net. According to Google Ad Planner, among Msn.com, Yahoo.com.co, and Live.com, the three most visited web portals in the country (see Table 9), audiences' favorite topics or activities are: gossip and tabloid news, general country information, television networks and stations, music, family and relationships, and service provider portals.

Nonetheless, social media expert Rosa Cristina Parra believes that after the big civil mobilization against FARC guerrillas in 2008 (see section 3.2.1), social networks started a politicization process that got stronger during the 2010 presidential elections.⁸¹ People realized that Twitter, Facebook, and blogs were not meant only for personal communication, or to be personal diaries, and started using them for political discussions and news debates. Parra also states that this behavior was predictable considering that the country has suffered a long armed conflict that affects society at all levels, including communication. For most of the 20th century

80. Calculation based on GoogleAdplanner statistics, including duplicated visitors, at <http://bit.ly/ha1G7K> (accessed 5 January 2011).

81. Interview with Rosa Cristina Parra, journalist and consultant in strategic communication, education and social mobilization, Bogotá, 12 January 2011.

journalism and media were regulated by the government and there was open censorship. Only after the Constitution of 1991 has press freedom become considered a fundamental right.

3.2 Digital Activism

3.2.1 Digital Platforms and Civil Society Activism

There is no doubt that new media have created novel citizen and communicative dynamics. Journalism is no longer a newspapers' monopoly. The process of information diffusion and production has changed. As a result, traditional media have created citizen journalism sections and almost every news website has implemented walls for comments under each article and allowed users to rate the quality of the information provided.

Since 2008, digital activism has grown in Colombia, and netizens (active internet users) have proved the power of social networking in the country. Political debates and hostage rescue operations have, among others, triggered big digital mobilizations, especially on Facebook and Twitter, where people have gathered to support or criticize journalists' and elected officials' work. However, on most occasions this kind of participation stayed in the digital world and did not become real actions or mobilizations in the offline world.

These are three prominent cases of digital activism that have successfully affected the “real world.”

Un millón de voces contra las Farc (One million voices against Farc)

On 4 January 2008, Oscar Morales, a 33-year-old engineer living in Barranquilla, created a Facebook group against the FARC, the largest guerrilla movement in the country. By the next day, the group had 1,500 members, four days later 40,000 and by the end of the month 150,000. Due to its success, a few days after creating the group, Morales and some other leaders who had joined him as group administrators decided to call for a protest action.

Using Skype and Google documents, they gathered a group of 200 people to organize parallel marches in different cities in Colombia and abroad. In order to get traditional media attention, they sent a press release by mail to 50 well-known journalists and opinion leaders in the country. Within days, the news spread like wildfire. Radio stations, television channels, and newspapers had taken up the story and encouraged people to join the protest, scheduled for 4 February 2008. Some private companies donated money for advertising. The Catholic church supported them and even the former president Alvaro Uribe went marching together with his cabinet. On 4 February, over 10 million people poured into the streets of 20 cities in Colombia and 45 cities around the world to march against the FARC guerrillas.⁸² The original Facebook message “No more kidnapping, no more lies, no more deaths, no more FARC” was waved in big flags, and worn on T-shirts all over the world. It was a complete success that, according to Morales, “remains as a memorable chapter in the country's history and a reference for further youth mobilizations.”⁸³

82. See <http://bit.ly/fywSvT> (accessed 10 January 2011).

83. Interview with Oscar Morales, founder and leader of “One Million Voices Against FARC,” 14 December 2010.

The Chiqui Locomotion Case

On 17 September 2009, the body of 19-year-old Ana María Chavez was found dead in her apartment in Bogotá in what seemed to be a burglary. However, her older brother found evidence that indicated the killers knew her sister from before. He gathered a group of about 20 friends to start looking into Ana María's Facebook profile for comments or photos that matched the boys who appeared in her building's surveillance videotapes. They agreed that the main suspect was someone nicknamed Chiqui Locomotion, a boy the victim had met in Facebook, and who had erased some previous communications with the victim. As he was a very active user, it was easy to follow his steps and collect evidence that linked him to the crime. Before going to the authorities with nothing but Facebook material, they made a Google search for the nickname Chiqui Locomotion, and found his music community with all his personal data, including his full name and national ID number. In October 2009, when the virtual investigation reached the authorities, John Sierra Molina, better known as Chiqui Locomotion, and his partner Juan Sebastian Obando, nicknamed "Sebitas," both 19 years old, were captured. In March 2010, after their confession, they were sentenced to 25 years in a state prison. The case was revealed by the mainstream media the day of the trial and became very popular among Facebook users and netizens as a crime planned and solved using a social network.

La Ola Verde (The Green Wave)

In 2010, Antanas Mockus, Enrique Peñalosa, and Luis Eduardo Garzón, former mayors of Bogotá, joined a new political party, *Partido verde* (Green Party), which gained outstanding popularity within months, especially among young people, who have usually shown low levels of political engagement. The independent flag captured the attention of new voters and they started a big social media campaign on their own initiative. It spread mainly by Twitter, where Mr Mockus acquired 94,000 followers,⁸⁴ and Facebook, where he got over 800,000 supporters.⁸⁵ It became a digital phenomenon known as the "green wave" because the mobilizations came directly from the people and not from a campaign marketing strategy. For the first time in the country's history, a presidential campaign entered the digital space and tested the candidates' skills to gather voters in this new arena. During the electoral period, traditional media talked about Mr Mockus as a digital phenomenon, and although he did not win the elections,⁸⁶ the "green wave" remains as a reference for virtual campaigns and citizen activism.

3.2.2 The Importance of Digital Mobilizations

Although there are many Colombians participating in websites, creating blogs, and adding content in platforms like YouTube, they do not represent the largest portion of the population. Therefore the impact of digital mobilizations should be carefully pondered.

84. See <http://Twitter.com/#!/@antanasmockus> (accessed 8 January 2011).

85. See <http://www.Facebook.com/#!/a.mockus> (accessed 8 January 2011).

86. Mr Mockus was second with 3.5 million votes, behind Juan Manuel Santos with 9 million. See <http://bit.ly/gtRPHq> (accessed 15 January 2010).

Most of the digital activism among Colombians is politically related. As a result of the success of the 2008 “One million voices against FARC” protest (see section 3.2.1), people began to better understand and use digital tools, and actually some other protests were successfully mounted through Facebook. Afterwards, during the 2010 presidential and congress electoral campaigns, there was a lot of digital activity. People by their own initiative created slogans, support groups, songs, T-shirts, online games, and communities. Creativity, digital skills, and participation were so overwhelming that they took candidates by surprise. Politicians, media, and citizens witnessed for the first time the power of digital tools in politics. Cesar Paredes and Guillermo Franco, two experienced online editors, agree that campaign managers were not well prepared for such digital activism and so they failed in their attempt to transform all that energy and enthusiasm into real votes.⁸⁷

Many politicians, including ex-president Alvaro Uribe, current president Juan Manuel Santos, and many senators and leaders, maintain Twitter accounts and release information through them.

There are also several journalists and civic organizations that use Twitter to communicate, attract, and raise audiences’ awareness on certain issues. Some of this websites are widely viewed, and due to digital campaigns and mobilizations, have a significant impact.

A good example of a civic organization is the Belen de los Andaquies Audiovisual Children’s School (*Escuela Audiovisual Infantil Belén de los Andaquíes*), which thanks to digital resources has become a leader on educational programs and art narratives that have been given national and international awards. It was created in 2005 in Belén de los Andaquíes, a faraway village in the department of Caquetá, an area near the Amazonian region that has been affected by armed conflict, starting as a radio program aimed at children of different ages. Due to its success it quickly became an academy where children could learn how to express themselves through video, audio, and different kinds of multimedia. Alirio Gonzalez, the school’s founder, says that the school was meant to help children to communicate, to dream, to play, and to have fun, and at the same time to teach them the power of digital tools in the craft of storytelling.⁸⁸ This amazing initiative was unknown until 2006, when the school created a blog⁸⁹ and a YouTube channel⁹⁰ to post the children’s work. Since then, thousands of comments have been posted by Colombians and people abroad who are astonished at the children’s skills. They also have a Facebook profile where the school team has discussions with people interested in community spaces and communication.⁹¹ In 2010, the school won a national award in Children Quality Television Production offered by the Ministry of Culture.

87. Interviews with Cesar Paredes, journalist and online politics editor for *Semana.com*, Bogotá, 26 November 2010; and with Guillermo Franco, journalist, former manager of the Media Unit of CEET and former editor for *ElTiempo.com*, Bogotá, 17 December 2010.

88. Alirio Gonzalez, “*Contar lo que hacemos para descubrir para donde vamos: Una Mirada a la Escuela Audiovisual Infantil de Belen de los Andaquíes, Caquetá*” (To tell what we do, to discover where we go: An inside look to the Children’s Audiovisual School of Belen de los Andaquíes, Caquetá), 2005, p. 6, at <http://bit.ly/hYPOur> (accessed 8 January 2011).

89. See <http://bit.ly/yMUQ> (accessed 8 January 2011).

90. See <http://bit.ly/fOthQy> (accessed 8 January 2011).

91. See <http://on.fb.me/dPIghD> (accessed 8 January 2011).

Even though digital activism has grown in recent years, it still concerns a minority of the population. However, cases like the children's audiovisual school prove that the scenario can be modified. Regardless of the low internet penetration in rural areas, people of all ages and from all over the country can become interested in digital tools and virtual spaces for communications and mobilizations.

3.3 Assessments

The information market has grown due to UGC and audience participation. Mobile platforms have allowed people to be informed at every moment and to publish information from anywhere, anytime. Mobile devices can carry information from distant places that are not part of traditional media coverage. Mobiles are also helpful in carrying breaking news about natural disasters or traffic jams. The political online editors Catalina Lobo-Guerrero⁹² and Cesar Paredes acknowledge that they have picked up facts from users' tweets in order to write their own stories. They recognize this might still be a rarity in Colombia, but predict that it will become more common and should not be underestimated.

Social media allow people to give and receive information instantly in a free and unlimited way. However, not everything people post can be considered news or reliable material. Many Twitter or Facebook posts concerning current events are written without the discipline of verification, and become personal opinions rather than news. In Colombia blogs are not yet seen as serious or reliable media, and few digital media can be trusted as good-quality news providers. LaSillaVacía may be the best—and indeed, so far the only—example of a new website that has been very successful because of its accuracy and journalistic rigor (see section 4.2.3).

92. Interview with Catalina Lobo-Guerrero, former editor of Votebien.com, a website specializing in election coverage, Bogotá, 23 December 2010.

4. Digital Media and Journalism⁹³

4.1 Impact on Journalists and Newsrooms

4.1.1 Journalists

Changes in the work of journalists due to new technology and digitization vary according to factors such as the size of media organizations and their geographic location; connectivity is higher in larger cities. Technology seems to have made its impact first, stronger, and faster in the bigger media located in Bogotá. Regional media perceived the impact later, and many of them have been progressively adjusting to online information dynamics, instead of simply posting print content on the internet. Some regional newspapers such as *El País*, *El Colombiano*, *El Heraldo*, *Vanguardia Liberal*, and *El Universal* have altered their online editions to differentiate their content from the printed version. National coverage newspapers such as *El Tiempo* and *El Espectador*, whose online versions are completely different from the print editions, traveled this same path earlier.

Generally speaking, regarding the journalistic work there are three main changes to mention.

1. Changes in the news cycle

The majority of interviewed journalists agreed that the immediacy of the internet has had a strong impact on the news cycle. “Before, you had 24 hours to verify some information. Now you have less than half an hour,” says Guillermo Franco.⁹⁴ Since launching their online versions, traditional media have had to adjust their news cycles. For instance, *Semana* magazine is a weekly print magazine. Its online version (*Semana.com*) team works according to a completely different news cycle, since it is updated daily and it is actually competing in immediacy with newspapers such as *ElTiempo.com*, or *ElEspectador.com*, says Mr Paredes.⁹⁵

93. Most of this chapter is based on direct and telephone interviews with 13 Colombian journalists, media leaders, and media observers and analysts. The interviews took place in Bogotá between November 2010 and January 2011.

94. Interview with Guillermo Franco, journalist, former manager of the Media Unit of CEET and former editor for *ElTiempo.com*, Bogotá, 17 December 2010.

95. Interview with Cesar Paredes, journalist and online politics editor for *Semana.com*, Bogotá, 26 November 2010.

2. New ways of information gathering

Although traditional ways of reporting (by phone and by accessing physical public documents, for example) are still the most popular, Web 2.0 ways of reaching sources are rapidly becoming popular. Some editors report that young journalists are sensitive and used to digital tools, and therefore on their daily reporting work they go first to Google or Twitter to begin gathering information. Some internet tools used by journalists to access sources are e-mail, chatrooms, and social networks such as Twitter and Facebook.

In some cases, social networks, particularly Twitter, have become the direct source of information, since many public figures and celebrities have joined these networks. The case of ex-President Alvaro Uribe is a good example. Since leaving the presidency, he has become a heavy Twitter user.⁹⁶ Considering his popularity and his influence on local politics, some of the tweets in which he states his opinion on current events have become news. Also his confrontations on Twitter with journalists have been reported in the media.⁹⁷ Some media observers consider this tendency a threat to journalistic work, since journalists lose their role as researchers and information gatherers when a simple Twitter update becomes the story, as journalists pick the update up and publish it in the media as news.

3. The role of the audience in news production.

Almost all news sites have a comments section on each story. In general, online versions of traditional media do not answer users' comments, and often the comments section becomes a place for rude discussions and insults. On the other hand, some new media (born online), such as LaSillaVacía.com, have the rule of always reading and responding to their audience's comments. As a result, according to the site director Juanita León, approximately 30 percent of their content is provided by their audience: users give journalists via email or via the comments section ideas to write new stories or leads to develop investigations.⁹⁸ Also, on the comments section, sometimes users correct or complement the information presented in the stories. On the users' section of LaSillaVacía.com, audience members can, assisted by an editor, produce and publish their own stories.⁹⁹

Simón Posada, the editor of KienyKe.com, an online media outlet launched in November 2010, says he wakes up listening to the news on the radio, and also checking the trending topics on Twitter, to see "what people are talking about," in order to search for hot topics for the daily media agenda.¹⁰⁰ This young online magazine recently integrated the comments section of the stories it posts to Facebook, so that as users comment on the news they share the story and comments on their Facebook profile. KienyKe.com does not have a citizen journalism section, but it recently launched a users' blogs section.

96. At <http://twitter.com/alvarouribevel>

97. For an example on the Caracol radio station site, see <http://bit.ly/fcTtRQ> (accessed 8 January 2012).

98. Interview with Juanita León, director of LaSillaVacía.com, Bogotá, 14 December 2010.

99. See <http://www.lasillavacia.com/usuarios> (accessed 8 January 2012).

100. Interview with Simón Posada, editor for KienyKe.com, Bogotá, 23 March 2011.

Some online outlets are also innovating not only in the agenda but in their storytelling techniques, with maps, interactive graphics, and multimedia resources. However this is not the rule and text is still predominant. Hypertext has become more and more common, and for online-only media—such as LaSillaVacía.com—it is the rule.

4.1.2 Ethics

All journalists interviewed agree that the internet as a medium should follow the same ethical rules applied to journalism in traditional media. Javier Dario Restrepo, an experienced journalist and journalism ethics expert, points out that ethical demands are even higher on the web since it is more powerful than other media. Diversity of sources, verification, and critical analysis of what sources say are signs of quality journalism online and offline, says Mr Restrepo.¹⁰¹

Journalists recognize as the main ethics-related issues they face in their daily practice online the following.

1. **Fake sources.** The internet facilitates a certain kind of anonymity. Therefore, there is a lot of sourceless information or even fictional characters that journalists have to handle very carefully. Anonymous emails, fake Twitter profiles, or photomontages are some examples of misleading sources and data. Journalists interviewed pointed out that fact checking is even more important now.
2. **Immediacy.** Although live broadcasting was born with radio and became popular with television decades ago, the internet reaches a level of immediacy not seen before. Interviewed journalists and media analysts said that media can fall into the trap of posting information immediately without verifying, breaking an essential rule of journalism ethics.
3. **Privacy.** Social networks allow people to post, share, and spot personal information and materials, such as family photos. The traditional dilemma of what is public and what is private is accentuated online, where almost all information seems to be public. “Journalists have to ask themselves what the source may not even be asking herself ‘Would posting this information infringe upon someone’s privacy?’” says Carlos Cortés, a journalist and former director of the Foundation for Press Liberty (*Fundación para la Libertad de Prensa*, FLIP).¹⁰² Some interviewed journalists mentioned that currently privacy issues are their most frequent ethical dilemma.

4.2 Investigative Journalism

4.2.1 Opportunities

Journalists interviewed for this report agreed that a lot of reporting work and journalistic tools remain the same in the digital era, since it is still necessary to rely on trusted, and sometimes confidential, sources, go to public offices to request information, and place a formal information request (*derecho de petición*) in order

101. Interview with Javier Dario Restrepo, journalist and journalism ethics expert, Bogotá, 12 January 2011.

102. Interview with Carlos Cortés, journalist and former director of FLIP, Bogotá, 10 December 2010.

to access public records.¹⁰³ However, some new strategies are being used for investigation, especially among younger journalists.

1. The use of social networks. Some of the journalists and editors interviewed agree that the use of social networks for reporting is increasing among journalists. Ms León says they have successfully used crowd-sourcing to elaborate some of their investigative stories.¹⁰⁴ She points out that professional journalists verify all information supplied by the audience, but the audience can provide leads and clues for investigative stories. Investigative journalists also search on Twitter for reactions, considering many politicians and public figures are tweeting (see section 4.1.1). Jorge Cardona, editor-in-chief of *El Espectador*, says that they have found out about connections and relationships among investigated people searching on their Facebook profiles.¹⁰⁵
2. Public information online. Many official sources of public information and databases can now be accessed and easily searched through the internet. Journalists can now have online access to laws, decrees, resolutions, administrative acts, edicts, and legal notices through digital versions of the *Procurement Daily* (*Diario Único de Contratación*), the *Official Daily* (*Diario Oficial*), and the decisions of the Attorney General (*Procuraduría General de la Nación*), among others. Although there is still a lot to do in terms of digitizing public information, journalists are now taking advantage of these resources.
3. Transparent and link journalism. Since information is available for journalists it also is for citizens. Some media such as LaSillaVacía.com are beginning to practice transparent and link journalism, since their stories link directly to the document sources online or to previous stories or statements in other media, to provide context and additional information for the audience. For example, in 2009 LaSillaVacía.com published various documents related to the “false positive” (*falsos positivos*) scandal (the military were accused of killing civilians and then claiming they were guerrilla members).¹⁰⁶ The documents disclosed by the news site actually helped the families of the victims to gather evidence for a legal process.

4.2.2 Threats

The Political Constitution of Colombia guarantees press freedom as a fundamental right and guarantees protection for journalists in order to preserve their professional freedom and independence.¹⁰⁷ However, Colombia is a country with a very complex situation in terms of press freedom, particularly in the rural areas, for two main reasons: on the one hand, the internal conflict, which is stronger in rural areas where there are still disputes over territorial and political control; on the other hand, most of the advertising in regional

103. Since the Constitution was promulgated in 1991, every person in Colombia has the constitutional right to request information from government authorities, whether for public interest reasons or for particular purposes. The authorities are obliged to answer every information request in no more than 15 days from the receipt of the request. Journalists often use this civil resource to get access to public information.

104. Interview with Juanita León, director of LaSillaVacía.com, Bogotá, 14 December 2010.

105. Interview with Jorge Cardona, Bogotá, 7 December 2010.

106. See <http://bit.ly/3trZbN> (accessed 8 January 2012).

107. Political Constitution of Colombia, Art. 20 and Art. 73, at <http://bit.ly/cGrE8r> (accessed 8 February 2011).

media comes from local governments and therefore there are cases of self-censorship of media that avoid publishing information related to corruption issues or irregularities in handling local issues for fear of losing their funding (see section 7.3.1).

Political polarization and power abuse is also a threat to press and expression freedom. In this regard, government bodies have recently committed violations of press freedom. Members of the government of the ex-president Alvaro Uribe and former officials of the Administrative Department of Security (*Departamento Administrativo de Seguridad, DAS*) are now facing legal charges in the case known as “Eavesdropping by the DAS” (*Interceptaciones ilegales del DAS*), in which DAS detectives followed, spied on, intercepted telephone conversations and emails of, and otherwise threatened journalists, opposition politicians and judges of the Supreme Court.¹⁰⁸ Fernando Tabares, former intelligence director for the DAS, and Jorge Alberto Lagos, former counterintelligence director, have already been condemned by the Superior Court of Bogotá (*Tribunal Superior de Bogotá*), and 52 other DAS officials are under investigation by the Attorney General (see also section 7.3.3). This case is considered as a threat to press freedom as it has been confirmed that various investigative journalists critical of the government were systematically spied on, threatened, and discredited by the DAS.

According to FLIP, in 2010 there were 120 violations of press freedom: 51 of them were threats, 33 were inhuman or degrading treatment, 30 were obstructions to journalistic work, and eight were other kinds of violations.¹⁰⁹ To a large extent (47 percent of the cases) threats were anonymous and the author(s) of the violations remained unknown. In 25 percent of the cases the violations were committed by the military and police forces, 18 percent by individual citizens, 14 percent by government employees, 6 percent by the paramilitary, 5 percent by the guerrillas, 3 percent were committed by drug dealers, and 2 percent by politicians. (It is worth pointing out that none of these threats is related specifically to digitization.)

However, in Colombia, as in many other countries, the internet and new media represent a vital contribution to freedom of expression, “since information does not need intermediaries, such as journalists or media, and it can be accessed directly from primary sources or sources not necessarily tied to the media,” says Andrés Morales of FLIP.¹¹⁰

The dark side of this positive contribution is that digital media are also being used to threaten freedom. According to Mr Morales, in 2010 four cases of censorship or attempted censorship of digital media were registered in Colombia. During the election period, the political cartoonist Jaime Poveda, known as Bacteria,¹¹¹ published a cartoon named “Accommodating polls” (*Acomodando las encuestas*), criticizing the

108. For further information, see FLIP, “*Espionaje contra periodistas*” (Spying on Journalists), December 2010, at <http://bit.ly/e84TWW> (accessed 13 January 2011) (hereafter FLIP, “*Espionaje contra periodistas*”).

109. FLIP, “*Informe sobre el estado de la libertad de prensa en Colombia 2010*” (Report on the state of press freedom in Colombia 2010), at <http://bit.ly/zoV37S> (accessed 13 January 2012).

110. Interview with Andrés Morales, executive director of FLIP, Bogotá, 16 December 2010.

111. See <http://bacteriaopina.blogspot.com> (accessed 13 January 2012).

filters applied to presidential polls. A few days later his Facebook account was mysteriously blocked.¹¹² Other cases are related to website hacking. *Contravia.tv.com*, the website of the critical and investigative journalist Holman Morris, was hacked last year, as was the site *ContagioRadio.com*, an online radio station.

Other risks are not related to press freedom but to the business model. Independent online media in Colombia still cannot be financed from advertising since advertising prices are low and advertisers are not investing that much in online media yet. Therefore, one of the big risks confronting online media committed to investigative reporting and political journalism is that they do not have a long-term viable business model, unless advertising online grows significantly and companies lose the fear and reluctance they have of advertising in an independent and critical media. “The question is: who will pay for investigative journalism?” says Ms León.

4.2.3 New Platforms

According to Blogalaxia, a directory of Latin American blogs, there are 4,258 registered Colombian blogs.¹¹³ Blogging in Colombia is popular among netizens, although most bloggers are self-financed and very few get an income from their blogs.¹¹⁴ There are very few blogs publishing journalistic content; most blogs are opinion-oriented. According to research developed by a blogger, Rafael Bayona, in 2008, in the Colombian blogosphere there are many more personal diaries than news blogs. Based on information provided by Blogalaxia, the report says that personal blogs constitute 38 percent of the blogosphere. The categories that follow are: opinion (10 percent), art and culture (8 percent), technology (5 percent), and politics, entertainment, sports, literature and music (with 3 percent each).¹¹⁵

However, the following sites are worth mentioning because they fill an empty space in the public sphere.

1. *LaSillaVacía.com*, a politically independent investigative outlet launched in 2009 by Juanita León, an investigative journalist with experience in traditional media (such as *El Tiempo* and *Semana*). It publishes stories mainly on politics, the internal conflict, and even some environmental topics related to mining licenses and concessions.
2. *VerdadAbierta.com* is a content aggregator specializing in a very sensitive topic: paramilitary groups in Colombia’s armed conflict. The project was set up in 2008 through the joint initiative of the Peace Ideas Foundation (*Fundación Ideas para la Paz*), and *Semana* magazine.¹¹⁶ The main idea of the project is to uncover the truth and to reconstruct the historical memory of the Colombian armed conflict in recent years. It also intends to become a source for the media as a site where journalists can find truthful and

112. FLIP, “Informe sobre libertad de prensa en el proceso electoral presidencial 2010” (Report on Press Freedom During the Presidential Election Period 2010), 2010, p. 4, at <http://bit.ly/eTGqxa> (accessed 13 January 2011).

113. See <http://colombia.blogalaxia.com> (accessed 14 January 2011).

114. Juanita León and Jimena Zuluaga, “Blogsfera colombiana: intimidad, realidad y nuevas formas de contar” (Colombian blogosphere: intimacy, reality and new ways of storytelling), 2009, at <http://bit.ly/dQL6q4> (hereafter “*Blogsfera colombiana*”).

115. See “*Blogsfera colombiana*,” at <http://patton.blogdeldia.com/item/623> (accessed 14 January 2011).

116. See <http://www.ideaspaz.org> and <http://www.semana.com> (accessed 14 January 2011).

well-organized information. Most of the posted contents are investigative journalism stories related to the armed conflict, and the paramilitary in particular. It also publishes academic investigations. As of June 2012, the site was averaging some 58,000 monthly visitors.¹¹⁷

4.2.4 Dissemination and Impact

The National Constitution of 1991 empowered citizens by creating various mechanisms for participation and civic action, such as the appeal for legal protection of fundamental rights (*Acción de Tutela*), the popular actions (*acciones populares*) to protect public rights and interests, and the formal information request (*Derecho de petición*) to access public information.¹¹⁸ “All these resources, with the addition of new technology, increase the interest of people for observance and demand of accountability, especially in the younger generations,” says Mr Cardona.¹¹⁹ Hence, in recent years, not only have technology possibly increased dissemination and public interest in investigative journalism, but also the forms of participation that have been opened online and offline.

There is a big potential for the dissemination and impact of investigative journalism, as online journalists are beginning to understand that on the web a story is not finished when published: posting the story in social media, in Facebook interest groups, and answering users’ comments are part of the dissemination cycle. Most media organizations have hired young people to be social media managers, who post leads and links to their stories in social media. Mr Paredes says that around 10 percent of *Semana.com*’s traffic comes nowadays from social networks.¹²⁰ Instead of waiting for people to go to the media, the media are now beginning to go where citizens are, who will have an impact on the dissemination of investigative stories.

Digitization has strengthened investigative journalism because it has given more visibility to reports, investigations, and complaints, and in particular to investigative reports produced not only by journalists but also by NGOs and academics, whose audience has the potential of becoming wider online. The internet is a convenient platform for sharing extensive documents, and it is also a good place for aggregating thematically in order to become a source for journalists, for example.

4.3 Social and Cultural Diversity

4.3.1 Sensitive Issues

Colombia is a country with big economic and social inequalities, and most media are in a few hands. Besides, the media market is small for the size of the country and its population (see section 1.3.1). The news agenda is very similar among different media outlets. Newspapers’ front pages, television and radio headlines, and

117. Google AdPlanner, at <http://bit.ly/PbBHeP> (accessed 11 August 2012).

118. The *Tutela* is a legal action that any citizen can undertake to defend their fundamental rights. It is similar to the writ of *amparo* or *recurso de amparo*.

119. Interview with Jorge Cardona, Bogotá, 7 December 2010.

120. Interview with Cesar Paredes, journalist and online politics editor for *Semana.com*, Bogotá, 26 November 2010.

even online media headlines are pretty much the same. In this context, interviewed journalists pointed out some of the main sensitive issues, as follows.

- The media themselves, as there is some kind of tacit covenant of respect among them: they do not say anything bad about other media.
- The social and economic gap.
- The land is also a delicate topic, as the internal conflict is related to a large extent to land property.
- The war actors (the military, guerrillas, paramilitary, criminal bands, drug dealers), especially because of all the pressure they exercise over the civil population. Therefore war victims are an issue too.
- Ethnic minorities, as they are under-represented in the media.

4.3.2 Coverage of Sensitive Issues

The most important sensitive issues are related to social inequity and property concentration, but beyond that, the media are themselves a sensitive issue for the media. It is rare to see media criticizing one another, or denouncing journalists or media relations with the economic and politically powerful.

Property and property concentration form an almost invisible issue on the agenda. Private corporations are seldom questioned by the media and there is very little corporate accountability. There is no information in the media regarding the intersection between economic and political power and interests.

For the most part, the poor are not represented in the media as political or social actors, but as victims of the war, natural disasters, and unemployment. Unions and social protests are usually covered by the media as issues of disorder (*asuntos de orden público*) and not political issues.

The second group of sensitive issues is related to the internal conflict. The war has been the main topic of public concern for years. However, there are problems related to the conflict that remain particularly neglected or underrepresented in the media. First among these are the victims. Besides displaced people, there are many other victims of the war: widows, orphans, kidnapped people, and demobilized children (*menores desmovilizados*),¹²¹ among others. Although the war has been going on for decades, only few victims have been recognized and rehabilitated. President Santos's government has introduced a victims' law (*Ley de Víctimas*), which has been controversial among politicians and the media because it considers as victims all those affected by illegal forces as well as the army. In the media, most of these stories are told from the perspective of the government or the perpetrators, rarely from the perspective of the victims. Only recently victims have gained some public visibility through the media.

121. Demobilized children are minors who have been illegally recruited by the guerrillas or the paramilitary for war and then lay down their arms. Their reintegration into civilian life is difficult as they have been fighters since childhood.

Questioning the military forces is hard for the media. Particularly, it is difficult to question their role in the conflict in terms of the relationships of some of their members with illegal armed actors, such as the paramilitary and, therefore, victimizers. The media do not generally touch this subject because the military is considered to have a lot of power. “Only if the official or former official is now away from power the story would be told, otherwise it is a taboo,” said one of the interviewed journalists.

In the same way, guerrillas, paramilitary, criminal bands, and drug dealers, the main actors in the conflict, are also a tricky subject for the media, particularly the small media in rural areas, because local journalists are under pressure and often they have to self-censure information in order to protect their security.

Indigenous people (3.4 percent of the population) and African Colombians (10.6 percent of the population) are the ethnic minorities in Colombia.¹²² They are generally under-represented in the media, not only in relation to the conflict, although the rural areas where most of this population is located have been affected by the armed conflict. The media often do not cover stories on minorities, and coverage of ethnic minorities is not regulated at all.

Besides these broad tendencies of coverage, the armed conflict has usually been covered from the perspective of the official version, coming from the government rather than from the citizens, and also usually from the victimizers rather than from the victims, like innocent civil populations from rural areas trapped in the middle of the conflict and displaced people.

Nonetheless, in recent years governmental and civil initiatives have started to give more visibility to the victims. In 2005, after the demobilization of paramilitary groups, the National Commission for Reparation and Reconciliation (*Comisión Nacional de Reparación y Reconciliación*, CNRR) was created to guarantee the victims’ rights and participation in the reparation process, and to monitor the reintegration of the paramilitary into the civil life.¹²³ The Historical Memory Group (*Grupo de Memoria Histórica*) was created within the CNRR to reconstruct the facts and the recent history associated with the illegal armed groups.¹²⁴ The group has published various reports on some of the cruelest massacres committed by the illegal armed groups, making the victims more visible. In this context, the media have begun to take up these stories of violence from a different perspective. Specialized content aggregation sites, such as VerdadAbierta.com, have been established (see section 4.2.3). But the relationship between some military and illegal armed forces is still a problematic issue for the media.

Some digital media such as LaSillaVacía.com and VerdadAbierta.com have begun to call attention to some of these issues, such as the relations between economic and political power, and the reality of the victims of

122. DANE, *Visibilización estadística de los grupos étnico* (Statistical visibility of ethnic groups), 2005, p. 12, at <http://bit.ly/fXHt4z> (accessed 14 January 2011).

123. See <http://www.cnrr.org.co>.

124. See <http://www.memoriahistorica-cnrr.org.co>.

the conflict. In recent years, some traditional media, such as *Revista Semana*, have supported the historical memory initiative (see section 4.3.2), writing reconstruction reports (*reportajes de reconstrucción*) on the war, with an emphasis on the victims' perspective.

4.3.3 Space for Public Expression

New and digital media, especially online, have positively affected the space for the public expression of minorities and interest groups. Most journalists interviewed for this project agree that there are now more sources of information, as interest groups, minorities, and ethnic groups are now more visible online, on blogs and websites. "About a 20 or 30 percent of the emails I receive come from NGOs. These groups are becoming a more interesting source for journalists as they are well organized and have taken advantage of digital resources," says Mr Cardona.¹²⁵ Besides, these marginalized actors have now the possibility of becoming main actors through their own media, instead of waiting for traditional media to call them to the spot.

Indigenous people, in particular, are an ethnic minority that is working on their online presence and the promotion of a digital community.¹²⁶ Interest groups, such as indigenous people, environmentalists, and human rights activists, may not have gained much visibility in mainstream media, but as they connect online with other minority groups abroad, and they communicate with multilateral or international organizations, they gain visibility. Nonetheless, they have still not joined the national news agenda.

Digital media are still emerging in Colombia, so it might be too soon to establish whether or not they are going to boost a new agenda. So far, online versions of traditional media are still maintaining the same agenda of their print counterparts. However, this does not mean they're using the same content online as offline. Some journalists and experts are skeptical about the technology's influence in making the public debate more plural. "There is a big gap between giving voice to someone—like having a blog to express yourself—and that voice becoming important in the public debate. It is a mistake to think that digitization and technology are going to bring diversity *per se*," says Mr Cortés.¹²⁷ In terms of news consumption, the majority of the population remains very oriented to traditional and well-known media. Although internet consumption has grown in recent years, in 2010 only 35.9 percent of Colombians reported using the internet (see Figure 4).

125. Interview with Jorge Cardona, Bogotá, 7 December 2010.

126. Some of their websites are: Colombian Indigenous Authorities (*Autoridades indígenas de Colombia*), <http://www.aicolombia.org>; National Organization of Colombian Indigenous People (*Organización Nacional de indígenas de Colombia*), <http://www.onic.org.co>; KankuamaTv (see section 3.3.2), <http://kankuamatv.blogspot.com>; Association of Indigenous Cabildos of North Cauca (*Asociación de cabildos indígenas del norte del Cauca*), <http://www.nasaacin.org>; and Indigenous Regional Council of Cauca (*Consejo regional de indígena del Cauca*), <http://www.cric-colombia.org> (accessed 14 January 2011).

127. Interview with Carlos Cortes, former Director of the Foundation for Press Freedom, Bogotá, 11 February 2011.

4.4 Political Diversity

4.4.1 Elections and Political Coverage

Digitization has not caused any change in the regulation of election coverage. However, the internet has brought new dynamics and tools for media coverage of elections. Most journalists interviewed for this report agreed that the internet can bring transparency to the electoral process. But they recognize a positive and a negative side based on their recent experience of the presidential elections in 2010.

The main positive changes are citizen monitoring and participation. New tools such as Twitter and Ushahidi were used by the media to incorporate UGC into their information. In 2010, the website *Votebien.com* (see section 4.2.3) developed a strategy for citizen observers to voluntarily monitor elections in different parts of the country. Through their mobile phones observers could send instant messages to report what was going on in their polling place, or to report frauds or irregularities. During the campaign period, some online media had video chats with candidates so that netizens could ask them questions directly. For a televised debate organized by the international news channel NTN24 and *LaSillaVacía.com* people could record their questions on video and send them through YouTube. The organizers made a selection of them and some questions posted online by citizens were asked of the candidates live on television.

The online sources *Votebien.com* and *CongresoVisible.com*, two websites exclusively dedicated to politics and elections, have become recognized sources for citizens and journalists. *Votebien.com* is a media outlet specializing in election coverage. It was born in 2002 as the result of an alliance of some media (*Caracol Radio*, *Revista Semana*, *Terra Networks Colombia*, and the news agency *Colprensa*), and national and international institutions and non-governmental organizations (NGOs) such as the United Nations Development Program, the Friedrich Ebert Foundation in Colombia (FESCOL), and the British and Dutch embassies, among others. It has covered every election since 2002. It is online all year long, but it is only updated during election campaigns. Its aim is to provide citizens and media with good-quality reliable information on politicians, parties, campaigns, and all election issues.

Official sources, such as the National Registry (*Registraduría Nacional*),¹²⁸ became important as they posted online all the electoral bulletins and press releases. Most party campaigns also went online to create dynamic websites, Facebook groups, and Twitter profiles, some of which were very successful in online citizen mobilization, such as the Green Party's (see sections 3.2.1 and 4.4.2).

The adverse results are, first, immediacy and disinformation. Given the immediacy of the web and the power of social networks, a message can be spread in seconds before being verified. In the presidential elections, some distorted or out-of-context statements by the candidates were circulated in social networks and digital media, leading to misunderstandings and misinformation. Second, given the country's political polarization,

128. See <http://www.registraduria.gov.co>.

the internet became a site for verbal offensiveness between supporters of different candidates in forums, commentary spaces, and social networks. There were also reported cases of censorship online (see section 4.2.2). Third, the anonymity online, facilitated by nicknames and avatars, can have a downside. As was discussed in online media and social networks in the 2010 elections, sometimes these active netizens can be minors (not allowed to vote), or use fake identities (*usuarios fantasma*) created by campaigners to distort the electoral debate.

4.4.2 Digital Political Communications

Even before the internet boom Colombia was experiencing a diversification of political voices. Until about three decades ago, the two traditional parties (liberal and conservative) were the main actors on the political scene. Since then, new political parties have arisen. Political diversity also increased as a result of the Political Constitution of 1991 that, among other changes, gave political representation in the Senate to indigenous and African Colombian people. Nowadays, young people, especially in urban contexts, understand politics in a more diverse and polychromatic way rather than only being blue or red (red is the traditional color of the Liberal Party, and blue represents the Conservative Party). Technology has made this diversification more evident as the number of communication channels has increased.

The most significant change is that the internet is generating a closer relationship and a more direct political communication between citizens and candidates. Nowadays many politicians have web pages, Facebook accounts, and fan pages, YouTube channels, and Twitter accounts, among other resources. Although in some cases their communications teams operate these tools, some politicians take very seriously these interaction channels and the citizens' messages they receive through them.

The communication level reached by Antanas Mockus, the presidential candidate for the Green Party in 2010, is a good example of this (see section 3.2.1). Although the Green Party's campaign was to a large extent developed by citizens' independent activism, the party also capitalized on this civic movement for the political campaign. Only after Mr Mockus's "Green Wave" did other candidates pay attention to their online campaigns. For instance, the campaign of Juan Manuel Santos, who was to be elected president, did not pay too much attention to social networks and online activism until the Green Wave was on the news and Mr Mockus began to rise in the polls. In the last part of the campaign Mr Santos put together a very successful campaign, advised, among others, by online campaign expert Ravi Singh, that even included sophisticated applications such as a video game called "Super Santos."¹²⁹

Some journalists and analysts agree that the 2010 election process sowed the seed for future campaigns. Next time candidates and campaigns probably will have their online strategy ready, the same way they do with their media plans for traditional media.

129. See <http://archive.santospresidente.com/supersantos/game.html> (accessed 14 January 2011).

However, it is also important to clarify that these dynamics take place especially in urban contexts. Rural politics is still tied to traditional strategies and, in Colombia, this is sometimes also related to corruption, clientelism (*clientelismo*), and the political machine (*maquinaria política*). In 2010 Colombia had two electoral processes: the presidential and the legislative. Internet dynamics were activated for the presidential election, but the legislative elections, whose campaigns are run on a smaller scale and in rural areas, were almost unnoticed online.

4.5 Assessments

Digitization has definitely affected journalists' work. On the positive side, it has increased the ways of accessing sources and information, and has given the audience a more active role in information production and circulation. In Colombia, the use of social networks is increasing significantly and as many journalists are joining these networks, they have become a new communication channel between journalists and citizens that enriches journalists' work and allows citizens to participate in the media agenda. According to the media observer and analyst Victor Solano,¹³⁰ new generations of journalists are now using new ways of reporting, as they are going online to gather information in social networks and accessing public records online.

Experts also agree that journalistic discipline should be stricter online, as ethics become more exigent when online journalists face almost daily dilemmas on privacy, anonymous sources or unverified information. Unfortunately, the immediacy of the web is a big threat to journalistic rigor. Fake sources, misleading information, and the lack of context and verification due to immediacy are bigger risks for accuracy in reporters' daily work.

Analysts point out that it is very important that journalism schools train future journalists not only in the new tools for reporting online and new ways for storytelling, but also on the relevance of journalistic discipline and ethics, no matter whether they use analog or digital media.

Digitization has affected election coverage and political campaigns, especially in urban areas. The presidential election of 2010 was an example—and maybe an advance viewing of future campaigns—of the use of new media in campaigns, civil activism, and journalistic coverage. One of the most interesting changes in journalistic coverage is the use of web tools such as Twitter and Ushahidi for crowdsourcing during election days, for citizens to report from their poll places. Websites such as Votebien.com and CongresoVisible.com are also a good example of new information sources about political elections for citizens and journalists. Some journalists and analysts expect that in the near future online platforms will become a tool for journalists and citizens to audit campaigns.

130. Interview with Victor Solano, Bogotá, 4 January 2011.

The main impact of digitization on marginalized groups is that they have the opportunity of creating their own websites, blogs, and digital outlets, instead of waiting for traditional media to make them visible. Marginalized groups are also connecting online with other interest groups, leaders, and journalists abroad or in rural areas. However, this does not mean that minorities or marginalized groups are becoming more visible on the mainstream media agenda.

Although the journalists' jobs have changed with digitization, the media agenda has not. Tools and possibilities in terms of alternative agendas and storytelling are still to be explored by journalists and audiences. However, pioneer projects are leading the way, and it is to be hoped that in the future online media will grow in the country in number and also in agenda diversity.

5. Digital Media and Technology

5.1 Spectrum

5.1.1 Spectrum Allocation Policy

Under the Constitution, the electromagnetic spectrum is a public good, to be controlled and operated by the state.¹³¹ Since then, various laws have been passed to ensure its efficient use and management. Government institutions, such as MinTic, the Regulation Commission of Telecommunications (*Comision de Regulación de Comunicaciones*, CRC), the National Spectrum Agency (*Agencia Nacional del Espectro*, ANE), and CNTV have been empowered to control and administrate the electromagnetic spectrum.

Among its various functions, the MinTic is responsible for the granting of permissions and spectrum allocations. It is also in charge of the establishment and update of the National Table of Frequency Allocation based on the country's needs, the public interest, and the recommendations of the World Radio-Communication Conferences of the International Telecommunication Union (ITU).¹³² The main responsibility of the CRC is to ensure free and fair competition in the telecommunication market. It is in charge of the regulation of several economics and administration aspects, such as the establishment of fees for the access and use of the networks and infrastructure, wholesale prices, the billing and collection conditions, the audio and video quality parameters, and the settlement of disputes between providers of communications networks and services.¹³³

The ANE is responsible for the technical supervision of the spectrum, the study and evaluation of national and international trends regarding the administration, monitoring, and control of the spectrum, among other technical matters.¹³⁴ Finally, CNTV is in charge of the management, control, and regulation of the television service. It is responsible for granting and renewing licenses, but it must coordinate its decisions with the MinTic over the electromagnetic spaces and frequencies.¹³⁵

131. Political Constitution of Colombia, Art. 75, at <http://bit.ly/eoJemv> (accessed 22 February 2011).

132. Law 1341 of 2009, *Diario Oficial* No. 47.426, 30 July 2009, Art. 18, at <http://bit.ly/ik8SMX> (accessed 12 March 2011) (hereafter Law 1341 of 2009).

133. Law 1341 of 2009, Art. 22.

134. Law 1341 of 2009, Art. 26.

135. Law 182 of 1995, Art. 23, at <http://bit.ly/f60ikc> (accessed 1 April 2011).

The current spectrum policy requires all networks and telecoms providers to pay an availability fee and a usage fee, which are set by the MinTic.¹³⁶ According to Resolution 290 of 2010, companies must pay an availability fee 2.2 percent of their gross incomes obtained through telecoms service provision, plus a usage fee whose price is determined based on bandwidth allocated, the number of potential users, service availability, expansion plans and coverage, demand for spectrum availability, and other technical parameters. The destination of these fees is the Information Technologies and Communications Fund,¹³⁷ which is the special account for providing support to the public television service and its cultural programming. It is administered by CNTV and its beneficiaries are RTVC and the regional channels (see section 2.1.3).

Once the MinTic has granted the space, each telecoms provider will have a 10-year concession. Then the contract will expire and companies will have to run again in a public tender to have a renewal option of 10 additional years.

Among the channels that use the spectrum, all public channels have free access and only the private channels are obliged to pay the license and spectrum usage fees, levied at 1.5 percent of the gross incomes of each frequency.¹³⁸ They have to participate in a tender to acquire a license (whose price is determined by CNTV), and once awarded the channel will have a 10-year concession that may be renewed for another 10 years as long as it runs again for the tender and pays the renewal fees.¹³⁹ As private television was only regulated in 1998, there has been just one renewal tender, which was very controversial regarding prices and competition (see section 5.1.3).

The implementation of digital television has brought some important changes in spectrum usage. New frequencies have been allocated and new challenges have emerged over spectrum allocation and policies. In 2009, one year after the selection of the DVB-T standard for digital broadcasting, the spectrum was reorganized, which led to the migration of several frequency bands; the television services that were broadcast in analog on 700 MHz had to switch to frequencies between 470 and 512 MHz.¹⁴⁰

As the digital signal makes a more efficient use of the spectrum, the migration of frequencies will result in an important digital dividend (698 MHz to 806 MHz) that, according to ITU suggestions, should be used for radio services whose purpose is public protection, rescue operations, and disaster mitigation to safeguard human life, and/or to provide telecoms services and networks for use by the International Mobile Telecommunications (IMTs). In Colombia the use of these white spaces is currently being defined. According to Juan Manuel Wilches, deputy director of spectrum management and technical planning at the ANE, Colombia is more inclined so far to choose the IMTs as the main beneficiary of the digital dividend, mainly

136. Resolution 290 of 26 March 2010, Art. 2 and Art. 4, at <http://bit.ly/g9cgTP> (accessed 21 March 2011).

137. Law 1341 of 2009, Art. 13.

138. Interview with Salua Abisambra, Chief of the CNTV Content Office, Bogotá, 10 February 2011.

139. Agreement 23 of 2007, Art. 9, at <http://bit.ly/e6xkp8> (accessed 12 March 2011).

140. Resolution 2623 of 2009, *Diario Oficial* No. 47.525, 6 November 2009, at <http://bit.ly/MV8Jk3> (accessed 12 August 2012).

because the government seeks to increase broadband coverage and users' digital opportunities through new spectrum allocation.¹⁴¹

In February 2010, CNTV established the specific frequencies for the public and private channels' digital signal: Canal Caracol will broadcast at channel 14; RCN at 15; RTVC channels (Canal 1, Institucional and Señal Colombia) at 16; at 17 the third private channel; 18 will be for regional channels (Teleantioquía, Telecaribe, Teveandina, Telepacífico);¹⁴² at 19 Canal Capital; and, finally, an open space has been left in channel 20 for a possible fourth private television channel that will not be offered yet.¹⁴³ Each frequency will have 6 MHz of spectrum space, which allows them to emit between one and four channels depending on the quality of the image and information provided.¹⁴⁴ Channels 43, 44, and 45 were reserved for mobile digital technology.

No privileges were given regarding bandwidth and each channel is free to decide its content and whether to use multiplex or not. However, CNTV determined that national public channels and some regional public channels would broadcast sharing the same bandwidth. This means Canal 1, Canal Institucional, and Señal Colombia will have a total of 6 MHz and they will have no multiplex option; and the same will happen to Teleantioquía, Telepacífico, Teveandina, and Telecaribe.

According to ANE, band migration began in the second half of 2011, and by 2013 all the frequencies and spaces must be distributed. The transition to digital television will occur within a 10-year period, and analog shutdown is supposed to happen on 31 December 2019. Until then, free-to-air television will continue to broadcast on channels 2–13.

5.1.2 Transparency

The allocation process is based on a public tender that, according to the law, should have at least two competitors. When allocating spectrum spaces or frequencies, the MinTic is responsible for ensuring plurality of bidders and it is responsible as well for choosing a winner based on an objective analysis that might include auctioning.¹⁴⁵ CNTV is in charge of the process for the television spectrum allocation.

For radio and telecom allocation the process seems to be transparent and fair. There is no evidence of any given preference, prohibition or exclusion of competitors, nor have there been complaints about lack of transparency. However, some community radio broadcasters have complained of a lack of fairness in the awarding of licenses because of some specific regulations for this kind of station (see section 7.2.3).

141. Interview with Juan Manuel Wilches, Bogotá, 7 March 2011.

142. The frequencies for the regional channels CanalTro, Teleislas, and Telecafé have not yet been assigned and no data are available.

143. CNTV.com, at <http://bit.ly/bHlHvN>, 15 February 2010 (accessed 25 February 2011).

144. CNTV, "*Proyecto de acuerdo técnico de implementación de la TDT en Colombia*" (Technical Agreement Draft on Implementation of Digital Terrestrial Television), Art 3, at <http://bit.ly/NefoRL> (accessed 10 August 2012) (hereafter CNTV, "*Proyecto de acuerdo técnico*").

145. Law 1341 of 2009, Art. 72, at <http://bit.ly/fJEFke> (accessed 12 August 2012).

The most critical case is related to television channel allocation, which has been severely criticized for lack of transparency. The winner of the tender for a third private channel, initiated in 2007, has not yet been assigned due to some accusations of irregularities over fair competition. In August 2007, CNTV announced a call for bids (*licitación*), for a third commercial television broadcaster. The process should have begun in 2008 and the third channel should have been operating in 2009.

The process took longer than expected, and CNTV published the pre-bid in August 2009. At that moment, three economic groups were interested in acquiring the license: the Cisneros Group (integrated by the Cisneros Organization of Venezuela in association with other private investors); the Planeta Group (Spanish media corporation represented in Colombia by Casa Editorial El Tiempo, formerly owned by the family of President Santos and the former vice-president Francisco Santos, of which Planeta owns 55 percent of the stocks since June 2007, in association with other private investors); and the Prisa Group (Spanish media corporation represented in Colombia by Caracol Radio in association with the newscast “CM&,” and some regional newspapers).¹⁴⁶

The pre-bid established that 50 percent of the decision would be based on the content proposal and 50 percent on the economic proposal of each group. The basic price (*precio base*) of the license was at the start established as US\$30 million and was later increased to US\$54 million. The award took two years longer than expected, and the final decision was supposed to be taken on 27 July 2010. In June 2010, both Cisneros and the Prisa Group decided to withdraw from the process, alleging irregularities and lack of guarantees and transparency.¹⁴⁷ The process ended up under investigation by the Comptroller and Auditor General and Attorney General (*Contraloría General y Procuraduría General*). However, CNTV announced on 9 July 2010 that the Planeta Group, the only proponent of the process, met all the requirements for the award.¹⁴⁸ On 22 July 2010, the State Council (*Consejo de Estado*) decided to suspend the adjudication process, arguing the bid did not have the required number of participants, which is against the law.¹⁴⁹ On 22 March 2011, the State Council ratified its decision on suspending the adjudication. As of August 2012 the process had not re-started.¹⁵⁰

5.1.3 Competition for Spectrum

According to Law 1341 of 2009, the state, through the MinTic, will promote competition, pluralism, and non-discriminatory access and will prevent monopolistic practices. It will sponsor free and fair competition scenarios that encourage current and future investment in information technologies and in the telecoms sector and allow for market competition under equal terms. It will provide the same conditions and privileges to all competitors and will encourage fair competition. To meet these mandates the government created

146. See Lasillavacia.com, at <http://bit.ly/dRHkDt> (accessed 12 August 2012).

147. Revista Semana, at <http://bit.ly/gn4ovn> (accessed 15 February 2011).

148. Revista Semana, at <http://bit.ly/afjTeK> (accessed 15 February 2011).

149. El Espectador, at <http://bit.ly/9aCu6U> (accessed 15 February 2011).

150. El Tiempo, at <http://bit.ly/l2yXrr> (accessed 15 June 2011).

the CRC and entrusted it with the task of promoting and regulating the competition for the provision of telecoms networks and services, and prevent unfair conduct and restrictive trade practices.¹⁵¹

Nonetheless, the implementation of digital television and the announcement of a new private channel in 2006 ignited several debates over fair competition. The first concern refers to the fact that, as of today, there is only one bidder for the third private channel tender (see section 5.1.2). The second concern is related to the inequality of the price of the license. The new channel will have to pay half or even less of what the two established channels, RCN and Caracol, paid when they started operations. CNTV determined a US\$32 million fee for the new channel license, while in 1997 the other two private channels paid US\$72 million for the same license,¹⁵² and for the license renewal 10 years later around US\$100 million.¹⁵³

This disparity has been justified many times by CNTV arguing that the new landscape ends with the duopoly system and as the number of competitors increases, the license price should decrease. It has also been discussed and refuted by the private channel companies that have referred to it as an unfair process. It is important to mention that the new third channel will indeed end the so-far closed and limited market of private open television (almost a duopoly) through the entrance of a new operator. However, the inequality of price creates an unfair competition among new and old channels. It is true that for many years RCN and Caracol benefited—thanks to the exclusivity agreement—from the juicy television market; this means they paid an expensive fee to have no competitors.

It is true that the actual market will be divided into three and perhaps four channels, so the fees cannot be as expensive as they were back in 1997. However, it is also true that CNTV has established on several occasions excessive prices for the licenses and has been forced to make reimbursements later on. In 1997, an arbitration tribunal (*tribunal de arbitramento*) in defense of the private channels license holders ordered CNTV to make a US\$5 million reimbursement to each channel (the license price changed from US\$77 million to US\$72 million), because it considered the prices were excessive.¹⁵⁴ In January 2011, CNTV announced a second reimbursement of US\$26 million of the renewal licenses for each channel, based on a more recent report that showed that television advertising revenues were miscalculated by over US\$8 million.¹⁵⁵

151. The CRC is the body in charge of promoting competition, avoiding abuse of a dominant position, regulating the networks and communication market, and ensuring the provision of services in an efficient and economic way that reflects high-quality standards: Law 1341 of 2009, Art. 19, at <http://bit.ly/fjEFke> (accessed 28 February 2011).

152. Lasillavacia.com <http://bit.ly/dRHkDt> (accessed 15 February 2011); <http://bit.ly/f39aR> (accessed 28 February 2011).

153. CNTV.com, at <http://bit.ly/g02Pku> (accessed 12 March 2011).

154. Mariomorales.info, at <http://bit.ly/f39aR> (accessed 28 February 2011).

155. Research by Ernst & Young found that the advertising revenues in open television channels INPTV were US\$460 million for 2009 and US\$373 million for 2010, and repudiated the values used for granting licenses, which were US\$ 464 million for 2009 and US\$377 million for 2010.

5.2 Digital Gatekeeping

5.2.1 Technical Standards

On 5 July 2006, the first Digital Television Forum took place in Bogotá, where experts from the United States and Europe explained the advantages of the ATSC and the DVB-T standards. After the forum, CNTV installed two test signals in the city to evaluate their performance. A year later, in November 2007, the Japanese standard was added to the group and trial demonstrations were carried out. Given the differences in the geography of the country, CNTV supported RTVC in making trials in Bogotá and two other cities. With the collaboration of the Colombian Engineers' Association (*Asociación Colombiana de Ingenieros*, ACIEM), the Rhode & Schwarz Company,¹⁵⁶ and the Japanese government, the digital equipment was also installed in Pereira and Cartagena in order to identify which of the standards responded better.

In August 2008, after two years and a long evaluation process, CNTT chose the DVB-T standard for digital television broadcasting. This made Colombia one of the few Latin American countries to prefer the European standard.

According to Lina Enriquez, adviser to the deputy minister of MinTic, the main reason for this choice is that DVB-T performed well technically in Colombia's complex topography. Besides, it was the only standard that guaranteed mobile television on the same band, and proved to be stronger in general for mobility and portability. The European standard proved to be cheaper for operators and users, and also, since is the most popular standard in the world, it was expected that Colombian users and operators would benefit from the scale economy generated in the market.

The international cooperation proposal for the transition process presented by the European Union (EU) was considered best by CNTV.¹⁵⁷ Among other conveniences, it offered private financing and loans with the European Investment Bank (EIB) (see section 1.2.1).¹⁵⁸ A big training program was also proposed by several European countries, such as Spain, France, Italy, and the UK, concerning consulting, technology training projects, business support for the transition from analog to digital, access to scholarships in digital programs, and several educational programs (such as t-learning software for DTT) that included specialized programs for people with disabilities and children affected by dyslexia.¹⁵⁹

Nevertheless, there has been some debate about the election of the DVB-T standard, mostly because among the 10 countries of South America, Colombia is the only one that has chosen it, and this can be seen as a disadvantage in regional cooperation and agreements. However, CNTV has clearly declared no intention to reverse the choice and has several times explained the reasons.

156. A German manufacturer company specializing in the test and measurement of equipment for mobile radios and radio communications.

157. Interview with Lina Enriquez, adviser to the Vice-minister of MinTic, Bogotá, 5 November 2010.

158. CNTV, "*Television digital Terrestre, standard para Colombia*" (Terrestrial Digital Television, Standard for Colombia), 28 August 2008, p. 48, at <http://bit.ly/dGuLHY> (accessed 10 March 2010) (hereafter CNTV, "*Television digital Terrestre*").

159. CNTV, "*Television digital Terrestre*," p. 57.

In 2010, in order to reinforce citizens' participation and promote public interest, CNTV organized 12 DTT information forums, where Colombians could express their opinions and demands regarding the new television service.¹⁶⁰ Over 5,000 people participated and over 2 million people could watch the forums over television. There have also been some advertising campaigns through private and public channels about the upcoming television signal, and an interactive website with up-to-date information on the implementation process.¹⁶¹ Nevertheless, it is worth mentioning that digitization remains an unknown subject among Colombians and advertising campaigns have not been as successful as expected. According to a survey in October 2010, only 31 percent of the population knew something or had heard about DTT.¹⁶² The reason why the public remains ignorant about this matter might be the low participation of private media in the advertising campaigns. Also, the debate about the new television license has gathered all the audience's attention, overshadowing other television-related news.

In December 2011, CNTV decided to update the chosen standard to DVB-T2, the latest version of the European standard.¹⁶³

5.2.2 Gatekeepers

So far, the analog arrangements have not changed. Cable and satellite providers are obliged to respect the must-carry rules for public service broadcasting, established in Law 680 of 2001.¹⁶⁴ The government has not yet announced new regulations for digital broadcasting in this respect. This means that the MinTic has not decided yet if all digital channels will have to follow the must-carry rules of the analog era.

Some satellite and cable operators are afraid of losing the high penetration they have gained in recent years if they cannot broadcast all the DTT channels. According to Ms Enriquez, cable companies see the DTT as a threat due to its multiple possibilities and they are developing strategies to maintain their users.¹⁶⁵ The bundled packages, which are becoming increasingly popular, can be considered to some extent as the telecoms companies' strategy to keep users subscribed to various services, so that the migration to a stand-alone television service will be less attractive. However, as digital broadcasting has just begun, it is hard to identify these strategies or the access problems that gatekeepers will pose.

160. The forums took place in Barranquilla, Valledupar, Bucaramanga, Medellin, Ibague, Manizales, Arauca, Villavicencio, Bogotá, Cali, Pasto, and San Andres.

161. See <http://DTT.rtv.gov.co/> (accessed 12 August 2012).

162. CNTV and ACIM, "Estudio General de Medios," 2010, *segunda ola*.

163. See <http://bit.ly/NlScFr> (accessed 12 August 2012).

164. Subscription television operators must broadcast, without any cost, the open television channels, including national, regional, and municipal, that broadcast in their coverage area: Law 680 of 2001, *Diario Oficial* No. 44.516, 11 August 2001, Art 11, at <http://bit.ly/gNeTkw> (accessed 12 March 2011).

165. Interview with Lina Enriquez, Bogotá, 5 November 2010.

5.2.3 Transmission Networks

There is no evidence that transmission networks or any other telecoms groups have been preferentially treated over spectrum spaces or resources. Under the terms of Law 1341 of 2009, the MinTic, CRC, and ANE are in charge of the granting and management of spectrum resources.

5.3 Telecommunications

5.3.1 Telecoms and News

Since 2005, the telecoms sector has been revitalized and strengthened. Several networks migrated toward internet protocol technologies, new national and international companies started competing on the internet and mobile telephony markets, and by 2009 the telecoms sector reached revenues of US\$11 billion.¹⁶⁶

In Colombia, more than 10 companies provide networks and other telecoms services, four of which dominate the market: UNE EPM, a public telecoms company owned by Public Enterprises of Medellín, which also provides energy and water services (22.38 percent of subscribers); Telmex Colombia, a subsidiary of Telmex, the largest Mexican telecoms enterprise (20.99 percent); Colombia Telecomunicaciones, owned by Telefónica, the Spanish multinational company that bought the national telecoms company, Telecom, in 2006 (19.92 percent); and Empresa de Telecomunicaciones de Bogotá (ETB) (19.54 percent), one of the oldest telephone companies in Colombia.¹⁶⁷

With 64.4 percent of subscribers, XDSL is the dominant internet access technology in Colombia. It is followed by cable (with 31.8 percent), WiMax, and other Wi-Fi connections (with 2.14 percent).¹⁶⁸ The preferred mobile internet terminal is the modem data card and 3G is the preferred technology. During 2009 broadband internet access increased (as it has been doing over the past years) and access through mobile platforms showed a major increase of 484 percent,¹⁶⁹ growing from 156,000 to 915,000 in one year (2008–2009). On the other hand, fixed telephony lines decreased by 5.7 percent over the same period,¹⁷⁰ and long-distance traffic also decreased almost 4 percent, with 150 million minutes per month.¹⁷¹

166. MinTic, “*Informe Sectorial de tecnologías de la información y las comunicaciones*” (Sector Report on Information Technologies and Communications), June 2010, p. 3, at <http://bit.ly/gMVkGw> (accessed 12 March 2011) (hereafter MinTic, “*Informe Sectorial*”).

167. MinTic, “*Informe Trimestral*,” p. 5.

168. MinTic, “*Informe Trimestral*,” p. 2.

169. MinTic, “*Informe Trimestral*,” p. 13.

170. MinTic, “*Informe Trimestral*,” p. 5.

171. MinTic, “*Informe Trimestral*,” p. 6.

According to a 2011 connectivity report by the MinTic, there were around 47.7 million mobile telephone lines registered in the country (100.3 per 100 people), and four mobile operators:

- America Móvil (from Mexico) with the Comcel brand: 65 percent of the market
- Telefónica (from Spain) with the Movistar brand: 22 percent
- Colombia Movil (51 percent owned by a Luxembourg company, Millicom International, and 49 percent by two local telephone companies, ETB Capital District of Bogota and Medellín EPM) with the Tigo brand: 12 percent
- UFF!, 100 percent Colombian-owned, with 0.54 percent of the market.

Among these 47 million active mobile lines, around 5 percent have internet access.¹⁷² However, mobile internet popularity has grown in the past few years, increasing by over a million subscribers from the last quarter of 2010 (1.4 million) to the last quarter of 2011 (2.6 million).¹⁷³ SMS and MMS are popular services among Colombians. According to one report, over 1.6 billion SMSes and 86 million MMSes were sent in the first quarter of 2010. IPTV is not yet a very popular service (see section 1.1.2), but penetration seems to be growing fast. UNE-EPM, the only company that offers the service in Colombia, had 120,000 registered users by 2010 and achieved an increase of 60 percent at the end of the year.

Cable is a significant market. Since its regulatory framework was established in 2000, its penetration has grown dramatically: it grew from 842,000 subscribers to 3.7 million over 10 years (see section 1.1.2). It currently reaches 79 percent of users and is by far the most popular television service. There are 54 operators across the country, among which the most important companies are: Telmex, with 44 percent of users, followed by Cable Union with 19 percent and UNE-EPM with 7 percent.¹⁷⁴ All of them have to respect the must-carry rules which oblige every subscription-based television operator to broadcast, without any cost, the open television channels, including national, regional, and municipal, that broadcast in the operators' coverage area.¹⁷⁵

Colombia has recently undergone some changes in terms of telecoms services and users' consumption habits. As mentioned above, cable operators were able to dominate the market of pay-TV within a few years. On the other hand, fixed telephony and long-distance traffic are decreasing, while mobile telephony and internet access through broadband have grown steadily. Bundle packages have become more and more popular. According to a 2009 survey, 73.8 of households with internet access got the service through a subscription television company.¹⁷⁶ The largest companies have bundled their services in one package, through agreements with

172. MinTic, "Informe Trimestral," p. 11, at <http://bit.ly/9rRwsl> (accessed 6 March 2011).

173. MinTic, "Boletín trimestral de las TIC, Conectividad 2011". At <http://bit.ly/xZXjAi> (accessed 12 August 2012).

174. Ipsos Napoleón Franco for CNTV, "Gran Encuesta de la Televisión en Colombia" (Great Television Survey in Colombia), 2008, p. 68, at <http://bit.ly/gJkbpo> (accessed 11 March 2011).

175. Law 680 of 2001, *Diario Oficial* No. 44.516, 11 August 2001, Art. 11, at <http://bit.ly/gNeTkw> (accessed 12 March 2011).

176. DANE and CNTV, "Gran encuesta," p. 17.

other service companies, mergers or purchases of telecoms companies or partnerships. ETB has an alliance with the satellite service provider DirecTv to offer fixed telephony and subscription television; Telefónica-Telecom has a triple-play package that includes television, broadband internet access, and fixed telephony; UNE-EPM will be offering the same package this year; and Telmex has recently announced a possible merger with Comcel to offer a four-play plan that includes mobile telephony service.

However, it is important to note that digitization is a new process in Colombia and the regulatory framework has not been completely established (see section 7). So far, most efforts have been focused on the spectrum allocation for digital television and the expansion of broadband coverage. The use of the digital dividend has not been completely defined; no new frequencies have been allocated for any new operators, and no regulation regarding new mobile applications has been established. According to Mr Wilches, between 2011 and 2013 the MinTic would allocate spectrum space in the bands 1,700–2,100 MHz and 2,500 MHz, and the ANE would encourage CNTV to expedite the band clean-up and migration process, in order to allocate as much spectrum space as possible within the next four years.¹⁷⁷

Telecoms companies do not have a significant role in news distribution in Colombia. Neither cable nor phone companies have yet developed successful news distribution strategies. Providers such as Comcel and Movistar offer news alerts via text messaging system (SMS), but the number of users is still very low.

5.3.2 Pressure of Telecoms on News Providers

It is not possible to identify any cases in which cable companies or telecoms operators have deliberately restricted the access to news services through traffic management or pricing. Pay-TV operators must respect must-carry rules and broadcast the open television channels with no additional charge.

5.4 Assessments

The recent spectrum allocation process has shown that the telecoms sector involves big and powerful interests that are subject to at least some measure of politicization. The controversy around the adjudication of the third television channel was evidence of the existence of contradictory forces and the influence of economic matters over public interests and needs. What was meant to be a new window of information and entertainment for citizens ended up in controversy, and the legal viability of the whole process is still questioned. The digitization process in Colombia coincided with the announcement of the end of the private channels duopoly, which has raised many debates between those interested in entering the juicy market of television and advertisement, and those who want to remain the only ones.

177. Interview with Juan Manuel Wilches, Bogotá, 7 March 2011.

As digital television has just begun to broadcast and its framework is not yet completely defined, it is hard to tell whether or not all society's needs are being taken into account. So far the regulation includes the most prominent private channels and the three national public channels. The network for regional channels is not yet deployed and the allocation policies do not mention the participation of ethnic groups and other minority groups.

There are several concerns regarding the coverage of the new signal and whether or not DTT is a more democratic television service. According to Mr Coronell, given the fact that for 50 years of analog television the government could not guarantee 100 percent coverage, and people have supplemented the national signal with community TV or cable, consumption habits might be hard to change.¹⁷⁸ DTT may not be that attractive to some Colombians who may prefer to stay in the analog system as much as possible.

DTT will be a free and more inclusive service. However, as the government has not established any kind of subsidies regarding set-top boxes' purchase, access to the digital signal will depend on the economic possibilities of each family and the digital divide might not undergo a significant reduction.

Nevertheless, it is important to mention that according to a 2011 report, CNTV will develop a new scheme that will adjust the current TV regulations to the new dynamics of television services, which are immersed in an environment of digitization and services convergence.¹⁷⁹

Since the use of the digital dividend has not yet been defined, there is no evidence of civil society pressure or debates on the protection of public interest. So far it seems that these frequency bands will be used for mobile technology expansion and that this decision might represent a benefit to both users and operators because of the reduction of prices and the availability of new applications and tools. However, given the digital gap among Colombians, the public interest will be protected only if the network's coverage and access are expanded.

The DTT multiplex option can also be considered as a benefit because it can reinforce national television production and expand the content offer (and therefore answer peoples' entertainment and information needs). However, considering that advertising revenues have decreased (from 2008 to 2009 advertising investment in television, radio, and magazines dropped 2.6 percent),¹⁸⁰ and that there are no rules regarding content, people might not end up with a more varied television menu at their disposal. Ms Abisambra and Mr Coronell agree there will be no content revolution.¹⁸¹ Digital television could multiply the amount of content, but it might not make it more diverse.

178. Interview with Daniel Coronell, Bogotá, 18 December 2010.

179. CNTV, "*Respuestas a la propuesta de lineamientos de política 2011–2014 y de Agenda Regulatoria 2011*" (Answers to the Proposal for Planning Policies 2011–2014 and Regulatory Agenda 2011), 27 January 2011, at <http://bit.ly/e5kHix> (accessed 12 March 2011) (hereafter CNTV, "*Respuestas a la propuesta*").

180. National Media Association (*Asociación Nacional de Medios*, Asomedios), *Informe de análisis de la inversión publicitaria neta -IPN- en Colombia y el mundo 2009* (Net Advertising Investment Analytic Report 2009), April 2009, at <http://bit.ly/guE075> (accessed 8 March 2011) (hereafter Asomedios, *Informe de análisis*).

181. Interview with Salua Abisambra and Daniel Coronell, Bogotá, 10 February 2011 and 18 December 2010 respectively.

6. Digital Business

6.1 Ownership

6.1.1 Legal Developments in Media Ownership

Legislation for news media ownership has not changed significantly since 2005. The only specific legislation on media ownership is the one that limits foreign investment in television: Law 182 of 1995 establishes that foreign investment in any television concession or company cannot be higher than 40 percent.¹⁸² The law also says that the state should encourage free and fair competition on terms of equality in the fields of information and communication technologies in general.¹⁸³

6.1.2 New Entrants in the News Market

In spite of this limitation, the main change in ownership in the news media market during the last years has been foreign investment in formerly Colombian-owned media companies. The most significant changes are described below.

Caracol Radio is the main radio network of the country (see Figure 9). Until 2003 it was owned by the Bavaria Group, headed by Julio Mario Santo Domingo, the 108th-richest man in the world and second-richest in Colombia.¹⁸⁴ In 2003, Caracol Radio was sold to the Spanish media group Prisa,¹⁸⁵ which also owned several radio networks in Spain and eight countries in Latin America. The Santo Domingo Group remains the main owner of one of the two open television private channels, Caracol Televisión, and of the newspaper *El Espectador*. (The Santo Domingo group is the former owner of Bavaria, one of the biggest companies in the country. In 2005, Bavaria's majority of shares was sold to Sab Miller.)

The two most recent governments have had very strong ties with the media. Francisco Santos, vice-president during the presidency of Alvaro Uribe (2002–2010), is a well-known journalist, related to the Santos family, which owned the *El Tiempo* newspaper until 2007 (when the Planeta Group bought 55 percent of CEET),

182. Law 182 of 1995, Art. 34, at <http://bit.ly/f60ikc> (accessed 1 April 2011).

183. Law 1341 of 2009, at <http://bit.ly/8XNCt3> (accessed 1 April 2011).

184. According to Forbes.com, at <http://bit.ly/iapfvI>, published 9 March 2011 (accessed 13 March 2011).

185. See the story in Semana.com, at <http://bit.ly/iilCCL> (accessed 13 March 2011).

and since 2010 has been the director of RCN Radio. The current president, Juan Manuel Santos (2010–2014), who was Defense Minister under Uribe, also belongs to the Santos Family, which means he is related to Francisco Santos and also to Alejandro Santos, director of *Semana* magazine. The Planeta Group, which bought 40 percent of CityTv Channel, was one of the bidders for the third channel tender, and the one which almost won it after the other two bidders withdrew claiming lack of transparency, among other issues. The new operator, Uff!, in mobile telephony, is part of the Carlos Ardila Lulle Group, which also owns RCN television channel and RCN radio stations.

El Tiempo is the most widely read newspaper in the country (see Figure 7). For almost a century, the Santos family was the main shareholder of the CEET. In 2007, Planeta from Spain acquired 55 percent stake of the company for US\$338 million (Prisa also made an offer, but Planeta finally succeeded).¹⁸⁶ In March 2010, the Aval Group, a banking group owned by the richest man in the country and the 75th-richest in the world,¹⁸⁷ Luis Carlos Sarmiento, acquired a 10 percent stake in CEET. A year later, in February 2011, Planeta announced that Mr Sarmiento had acquired an additional 21 percent, becoming the second shareholder of the media group, with a 31 percent stake. It was announced in April 2012 that Mr Sarmiento had acquired the 55 percent that Planeta owned,¹⁸⁸ making him the main owner of CEET, with 86 percent of the shares.

6.1.3 Ownership Consolidation

Market experts such as Lorenzo Villegas¹⁸⁹ and María del Pilar Noguera,¹⁹⁰ lawyers who specialize in telecoms, agree that the entrance of international owners to the domestic media market in Colombia has encouraged competition and led to improvements in service quality. “Foreign companies have more investment resources, and of course it is better for the user if service improves,” says Mr Villegas.

Another positive consequence according to some analysts is that as the media are now owned by businessmen instead of politicians, as it was before in Colombia; this should be synonymous with the independence of news outlets from political power. However, the relationship between economic groups and the media brings new risks (see section 6.4.3).

Omar Rincón argues that international ownership has brought new practices, new contents, ideas, and formats to Colombian media. However, the downside is a lack of respect for local media consumption practices, as international providers bring standardized content options or formats, without considering local audience preferences or local media practices. He concludes: “They are no longer meant to serve a society about public issues, but to serve the conglomerates’ interests, and that is wrong.”¹⁹¹

186. See the story in *Semana.com*, at <http://bit.ly/eoUtGL> (accessed 13 March 2011).

187. According to *Forbes.com*, at <http://bit.ly/dYvVpG>, published 9 March 2011 (accessed 13 March 2011).

188. See *Dinero.com*, at <http://bit.ly/JpmB0x>, published 19 April 2012 (accessed 17 May 2012).

189. Interview with Lorenzo Villegas, Bogotá, 16 March 2011.

190. Interviewed with María del Pilar Noguera by email, 18 March 2011.

191. Interview with Omar Rincón, Bogotá, 16 March 2011.

6.1.4 Telecoms Business and the Media

As in the media market (see section 6.1.2), the main recent change in ownership in the telecoms market is the foreign investment of telecoms conglomerates, such as Telmex. The most relevant changes in this sector are as follows.

In 2006 Telmex, owned by Carlos Slim, the richest man in the world in 2011,¹⁹² bought three of the main cable and internet access operators: TVCable, Superview, and Cablepacífico. A few months later, Telmex bought a couple more: Cablecentro and Satelcaribe. Telmex is now the largest cable television operator in the country, with over 50 percent of the market share,¹⁹³ and the third-largest internet access operator, with 21.94 percent of the market. In December 2010, Comcel, the main mobile operator (with a 65.98 percent market share),¹⁹⁴ announced its integration with Telmex Colombia.

In 2004 Telefónica bought the mobile company BellSouth (now Telefónica Movistar). In 2006 Telefónica also bought Telecom (formerly the public fixed telephone operator, Colombia Telecomunicaciones). Telefónica Telecom now offers fixed phone, cable television, and internet access. As of 2011, Telefónica Movistar is the second-largest mobile operator, with 22.39 percent of the market,¹⁹⁵ and Telefónica Telecom is the third-largest operator of cable and internet access, with 20.84 percent of the market.¹⁹⁶

In 2006, the mobile company Tigo, which belongs to the Luxemburg company Millicom International Cellular, bought Colombia Móvil,¹⁹⁷ the third-largest mobile operator in the country. Tigo is the third and smaller mobile operator in the country, with 11.62 percent of market share.¹⁹⁸

The first virtual mobile operator, called Uff!, was launched in November 2010. As it does not have its own network, it operates over the Tigo network. Uff! is owned by the Ardilla Lulle family, which also owns Channel RCN television and companies in diverse sectors.

According to Mr Villegas, in the near future regulators will define the parameters for the entrance of two additional cable television operators.¹⁹⁹ It is still too early to know what implications these consolidations may have.

192. According to Forbes.com, at <http://bit.ly/ht2rv6>, published 9 March 2011 (accessed 13 March 2011).

193. Dinero.com, at <http://bit.ly/f06uf3>, published 3 April 2009 (accessed 13 March 2011).

194. MinTic, *Informe técnico Trimestral de Telefonía Móvil* (Quarterly Technical Report on Mobile) 2010-III <http://bit.ly/gn0V7P>, Accessed 13 March 2011.

195. MinTic, *Informe técnico Trimestral de Telefonía Móvil* (Quarterly Technical Report on Mobile Telephony), 2010, III, at <http://bit.ly/gn0V7P> (accessed 13 March 2011) (hereafter MinTic, *Informe técnico Trimestral de Telefonía Móvil*).

196. MinTic, *Informe técnico Trimestral de Telefonía Móvil*.

197. MinTic, *Informe Trimestral de las TIC* (Quarterly Report on Information and Communication Technologies), 2010, at <http://bit.ly/ff4vh0> (accessed 13 March 2011).

198. MinTic, *Informe técnico Trimestral de Telefonía Móvil*.

199. Interview with Lorenzo Villegas, Bogotá, 16 March 2011.

6.1.5 Transparency of Media Ownership

Media, like all companies, have to report their ownership information, such as their stock composition, to the Superintendence of Companies (*Superintendencia de Sociedades*). This kind of information is public, as any citizen can request a company certificate from the Chamber of Commerce (*Cámara de Comercio*).

However, Mr Cortés says that although in Colombia it is possible to know who the media owners are, there is not a culture of citizens demanding accountability from the media.²⁰⁰ Neither is there active transparency from the media: for instance, they are not open about conflicts of interest they may have with other sectors. Things get worse in regional media, in which not only powerful economic entities but also politicians own media, especially radio stations. Even at the regional level, however, media ownership must be disclosed.

6.2 Media Funding

6.2.1 Public and Private Funding

Of public media, CNTV spent 61 percent of its 2010 budget on operating national public television (approximately US\$820 million).²⁰¹ RTVC's whole operational budget comes from CNTV's resources (see section 2.1.3). For figures, see Table 12.

Of private media, according to the Colombian Press Association (*Asociación de Diarios Colombianos, Andiarios*) and the National Media Association (*Asociación Nacional de Medios de Comunicación, Asomedios*), net investment in advertising during 2010 was worth \$ 1.5 trillion Colombian pesos (approximately US\$830 million).²⁰²

Table 12.

Distribution of net investment in advertising by sector in million Colombian pesos, 2006–2010

	2006	2007	2008	2009	2010
National TV	763,408	863,885	858,225	823,611	919,366
Radio	294,505	345,592	352,518	365,762	419,008
Magazines	105,912	11,889	108,196	93,488	99,876
Regional and local TV	47,228	59,306	58,633	58,794	65,275
Total	1,211,053	1,280,672	1,377,572	1,341,655	1,503,525

Sources: Andiarios and Asomedios, “*Estudio de inversión publicitaria neta año 2010*.”

200. Interview with Carlos Cortés, Bogotá, 11 February 2011.

201. CNTV, “*Propuesta de Agenda Regulatoria*” (Regulatory Agenda), 2011, p. 27, at <http://bit.ly/fbpXjf> (accessed 13 March 2011) (hereafter CNTV, “*Propuesta de Agenda Regulatoria*”).

202. Colombian Press Association (*Asociación de Diarios Colombianos, Andiarios*) and Asomedios, “*Estudio de inversión publicitaria neta año 2010*” (Advertising Investment Study for 2010), at <http://bit.ly/x5G5B5>. (hereafter Andiarios and Asomedios, “*Estudio de inversión publicitaria neta año 2010*”).

Since 2006, more than 60 percent of the total advertising spend has gone to national television. The investment in radio has been around 24–28 percent. The investment in magazines and local TV is below 10 percent each. Another important change in recent years is the increase in advertising investment of Colombian companies in international cable television channels.

According to a 2009 report by Asomédios, the 2008 financial crisis that affected markets in Europe and North America did not have much impact in Latin America, as in 2009 there was a modest increase of 0.3 percent of the advertising spend.²⁰³ Asomédios data indicate that traditional media advertising investment is slowly decreasing as digital media are emerging.²⁰⁴

According to IBOPE Colombia, media form the leading economic sector investing in advertising, with 32.7 percent of total investment.²⁰⁵ In second place comes the services, tourism, and commerce sector, with 8.7 percent. In the third place are civic and government campaigns, with 5.8 percent. In the fourth place is the telecoms sector, with 5.7 percent; and in the fifth place is the personal care and beauty sector, with 5.6 percent.

It is important to mention that even though in the larger picture of national advertising state advertising does not represent a big percentage, for many local media in rural areas private advertising is minimal and official advertising represents 50–60 percent of the advertising revenues. This is considered a risk factor for press freedom and media independence (see section 7.3.1).²⁰⁶

In recent years, advertising expenditure in digital media has begun to increase. According to IAB Colombia, investment increased 30 percent from 2008 to 2009, growing from around US\$21.5 million to around US\$28 million. In 2010, ad expenditure grew to around US\$41.8 million, which means growth of 55.77 percent over 2009.²⁰⁷

However, the share of online advertising is still small. In 2009 it was estimated at 3 percent, up from 2 percent in 2008. These numbers are very modest compared with television, and even with radio and newspapers, but they are significant compared with local television channels and magazines: digital media advertising investment is rapidly approaching these traditional media.

203. Asomédios, “Informe de análisis” (*Advertising Investment Analytic Report*).

204. Asomédios, “Informe de análisis” (*Advertising Investment Analytic Report*). This report does not include online advertising data.

205. IBOPE, *Inversión general – Sectores económicos* (General investment – Economic Sectors), Ranking February 2011, at www.ibope.com.co. (accessed 9 March 2011).

206. Open Society Institute and Civil Rights Association (*Asociación por los derechos civiles*), “El precio del silencio” (The price of silence), 2008, at <http://bit.ly/moLkgV> (accessed 8 March 2011) (hereafter OSI and Civil Rights Association, “El precio del silencio”).

207. IAB Colombia and PricewaterhouseCooper, “Reportes sobre compilación de la inversión en medios digitales” (Digital Media Investment Report), 2009, at <http://bit.ly/fH8fWJ>, March 2010 (accessed 8 March 2011) (hereafter IAB Colombia and PricewaterhouseCooper, “Reportes sobre compilación de la inversión”).

6.2.2 Other Sources of Funding

Funding in traditional media remains based on advertising and on user subscriptions and payments where they apply, such as in cable television, newspapers, and magazines. No new ways of funding are significant in traditional media. However, since online advertisement in Colombia is still an emerging, and comparatively small, market (see section 6.3.1), online media are creating new economic models.

6.3 Media Business Models

6.3.1 Changes in Media Business Models

The main effects of digitization in business models are seen on the internet. Although it is rapidly growing, online advertising in Colombia is still not too significant (see section 6.2.1). Therefore, pioneer online media have developed economic models of diversification with multiple inputs. More than half (53 percent) of LaSillaVacía.com's funding comes from three sources: workshops and conferences on digital literacy in universities and companies; consulting projects for companies on technology and digital interaction with the community; and advertising (15 percent). The rest of the funding (47 percent) comes from international organizations' grants and awards, such as the Open Society Media Program, the U.S. embassy in Colombia, the National Endowment for Democracy, and the Ford Foundation.²⁰⁸

But other online media such as KienyKe.com have decided to rely on advertising as their only source of funding. This digital magazine was launched in November 2010, so it is still early to break even. However, Mr Posada says they are confident of making a sustainable company based on online advertising, as they have a large advertising sales team and they have already attracted some big advertisers.²⁰⁹

Mr Rincón predicts that whether or not there is a significant increase in content provision in digital television, the market will not grow, and this represents a risk for content quality: "If a current television channel has 40 rating points, in digital television they will have to spread those rating points across four channels. And, as budget and market are not going to grow, they will have to produce, with the same people, the same equipment, and paying the same salaries, four different digital channels. Therefore, quality will decrease. The bad news is that the television market will not grow because people don't have any more time to watch television. Instead, internet and mobile platforms are colonizing each day more time and everyday routines of audiences."²¹⁰ In fact, a survey of media consumption reveals that if Colombians had to choose only one technological device, they would choose mobile phones (31 percent) and computers (29 percent) over television (22 percent).²¹¹

208. Interview with Juanita León, Bogotá 17 March 2011.

209. Interview with Simón Posada, Bogotá, 24 March 2011.

210. Interview with Omar Rincón, Bogotá, March 16 2011.

211. Survey by Ipsos Napoleón Franco for the Ministry of Information and Telecommunication Technologies –*MinTic*. Published 14 March 2011, at <http://bit.ly/gZoEF6> (accessed 24 March 2011).

However, traditional media are getting ready for digital switch-over with new market divisions. The most viewed open private television broadcaster, Canal RCN, created E-nnovva in 2008.²¹² This new company focuses on developing websites, content, and advertising for internet and mobile platforms. The general manager of this new company is the former programming vice-president for RCN.

6.4 Assessments

So far, digitization has not changed the dominant positions in the media market. But media and especially telecoms ownership has recently changed toward the transnational corporation model (see section 6.1.2).

In television, during the last 15 years—even before the advent of new and digital media—there has been a process of ownership, advertising, and audience concentration in the two private channels, Caracol and RCN. Mr Coronell thinks that the digital television model, as it is conceived in Colombia, is only going to multiply this market duopoly; even if there are more content options for the viewers, these contents would still come from the same main producers. “Digital television has not major chances of becoming a window for information pluralism,” he says.²¹³ Consuelo Cepeda, media ombudsman for Canal RCN, thinks that television digitization would be positive for content diversity, as audiences would be able to choose and design their own programming. However, she recognizes that not all citizens have the skills or are ready to design their own programming list.²¹⁴

For other media experts, the answer to breaking the information monopolies seems to be on the internet. “Online media can outperform traditional media, and monopolies can be broken. LaSillaVacía is a good example. Websites such as LaSillaVacía are questioning the media status quo. One would expect more media like this, but there is still time for that to happen,” says Mr Franco.²¹⁵

Transparency of media ownership has increased, as these big media businesses have become news, although there is little information on the potential conflicts of interest of these new actors in the media and telecoms sectors.

On the internet, the impact of ownership on the performance and independence of media is significantly less, as media set up online are not owned by powerful economic groups.

The internet has opened the door for a media outlet such as LaSillaVacía. According to Ms León, “Five years ago it would have been impossible to create an independent media, ruled by journalists without the investment of a powerful family or a conglomerate. Before the internet, penetrating the media market was

212. Interview with Carolina Angarita, available at <http://bit.ly/TtoRrG> (accessed 12 August 2012).

213. Interview with Daniel Coronell, Bogotá, 18 December 2010.

214. Interviewed with Consuelo Cepeda, Bogotá, 15 December 2010.

215. Interview with Guillermo Franco, Bogotá, 17 December 2010.

almost impossible. The internet reduces the initial investment and the cost of creating a media is lower. Probably, in five years there will be 10 media outlets like LaSillaVacía and this would make traditional media less complacent with the powerful.”²¹⁶ Concerning ownership, as LaSillaVacía is not owned by a powerful media group, Ms León says she has felt the difference in her journalistic daily work, as there are no pressures or political commitments. “During the last election period, for example, I felt that I really could do journalism without thinking about who or what was at stake,” she says.

Conflicts of interest are one of the main issues in media and advertising in Colombia. In television, for example, some large advertisers only invest in private channels, not only because they are the ones with the highest ratings, but because they belong to linked corporate groups. While there is transparency about who owns the media, there is less transparency on conflicts or potential conflicts of interest. According to Mr Rincón, there is also a lack of ideological transparency. “Media outlets sell themselves as neutral when they are not. Clearly they have political agendas related to their economic power, but they don’t assume these agendas publicly.” According to Mr Rincón, what would favor news outlets’ independence would be the existence of more outlets, so that advertising would disperse as media and audiences specialize, and advertisers would have to search for their market niches instead of remaining concentrated in the same traditional few massive media outlets.²¹⁷

216. Interview with Juanita León, 17 March 2011.

217. Interview with Omar Rincón, Bogotá, 16 March 2011.

7. Policies, Laws, and Regulators

7.1 Policies and Laws

7.1.1 Digital Switch-over of Terrestrial Transmission

Access and Affordability

Both CNTV and the MinTic have been leading the digitization process in Colombia under the DVB-T standard, chosen in August 2008 (see section 1.2.1). The government determined that DTT should be free-to-air and that television broadcasters would provide the basic contents of open television for television sets and digital mobile devices without cost to viewers. CNTV has estimated a 10-year transition to analog switch-off, calculated from 2008, the year the standard was chosen and the process began.²¹⁸

The total investment to ensure the digitization of public television is estimated to be US\$129 million. These resources are already being used, especially directed at infrastructure, such as installing power stations that cover about 42 percent of the country.²¹⁹ The first one of these stations has already been installed in Calatrava, in the western area of Bogotá. The first test broadcast of DTT, covering some areas of the northern and western part of Bogotá, took place in January 2010. On 28 December 2010, CNTV announced that the two private national television channels (RCN and Caracol) had begun their digital broadcasting for the cities of Bogotá and Medellín, covering 25 percent of the population of the country.²²⁰ In February 2011, Channel RCN announced that private channels would intensify their outreach campaign for the new technology and that before the end of the first half of the year the digital signal would reach Cali and Barranquilla, and by the end of 2011 they expected to be in Cartagena, the coffee zone, and the northern part of the country.²²¹ It is expected that 49 percent of total population will have access to the DTT signal by the end of 2012.²²²

218. Interview with Lina Enriquez, Advisor to the Vice Minister of Information Technologies and Communications. Bogotá. 5 November 2010.

219. CNTV. Proposed Regulatory Agenda 2011 (*Propuesta de Agenda Regulatoria*), p. 38, at <http://bit.ly/entNlh> (accessed 6 February 2011).

220. CNTV Press release at <http://bit.ly/eTGeam> (accessed 5 February 2011).

221. El Tiempo.com, 18 February 2011, at <http://bit.ly/eOkEt0> (accessed 19 February 2011).

222. See <http://bit.ly/PSkLok> (accessed 10 August 2012).

On 11 January 2011, CNTV published the Proposed Regulatory Agenda 2011 (*Propuesta de Agenda Regulatoria*), which includes the Policy for the Development of the Television Industry for 2010–2014 (*Política para el desarrollo de la industria de televisión*).²²³ The policy sets out, among other things, the commitments for 2014: first, achieving 100 percent coverage in the television broadcast signal, as currently 8.6 percent of the population cannot receive the public television service; and second, achieving 74 percent coverage of digital terrestrial television (DTT) by private channels across the country.

However, television digitization is not well understood by citizens (see section 1.2.1). CNTV began an outreach campaign about digital terrestrial television (DTT). Some of the outlets being used for these campaigns were television commercials, the micro site “All about digital terrestrial television” (*Todo sobre televisión digital terrestre*) on the CNTV site, brochures with FAQ on DTT, presence at events such as cultural fairs, and events and fairs in the telecoms sector.

CNTV established the technical characteristics for domestic equipment (television sets and set-top boxes), and some brands (such as Samsung, Sony, LG and Challenger) are already selling television sets that incorporate the digital reception system for the European standard DVB-T.²²⁴ It is estimated that from March 2010 to January 2011, 160,000 digital television sets were sold in the country.²²⁵

According to the MinTic, one of the reasons for choosing the European standard for set-top boxes (see section 1.2.1) was the affordability for both operators and users. “The difference was something like paying 200 dollars for a Japanese set-top box, and 30 dollars for a European,” says Ms Enriquez.²²⁶ CNTV has been negotiating the reduction of the import tariffs for set-top boxes with the National Taxes and Customs Department (*Dirección de Impuestos y Aduanas Nacionales*, DIAN), in order to make this equipment affordable for citizens.²²⁷ The price of basic set-top boxes for final users is estimated to be around US\$40 (the official minimum salary in Colombia is US\$315 per month), and the expectation is they will be sold in regular stores like any other appliance, says Luis Eduardo Peña, CNTV’s deputy technical director.²²⁸

Subsidies for Equipment

According to Mr Peña, no subsidy plan has been provided for the television sets or set-top boxes that DTT requires.²²⁹

223. See the document at <http://bit.ly/entNlh> (See page 27) (accessed 6 February 2011).

224. CNTV, “*Propuesta de Agenda Regulatoria*.”

225. ElTiempo.com, 18 February 2011, at <http://bit.ly/gqujZX> (accessed 20 February 2011).

226. Interview with Lina Enriquez, Bogotá, 5 November 2010.

227. CNTV, “*Propuesta de Agenda Regulatoria*.”

228. Interview with Luis Eduardo Peña, Bogotá, 17 February 2011.

229. Interview with Luis Eduardo Peña, Bogotá, 17 February 2011.

Legal Provisions on Public Interest

The Policy for the Development of the Television Industry states that one of its main objectives is to promote the development of cultural and educational television, and public interest television: “The proposed policy framework should be the basis of a democratic and participatory television system, which sees television as a public service in which citizens can exercise their rights, but which requires the clear commitment of those governmental authorities responsible for this sector, the support of the industry in strengthening its social responsibilities, and the mobilization of society to guarantee their rights as viewers and citizens.”²³⁰

The policy also defines as important objectives the promotion of television access for ethnic groups and minorities, strengthening the production of contents by these groups; the definition of a public policy for television content, and a public policy for the access of minorities to television; the promotion of ethnic minorities’ and children’s television; and support for policies to assist the displaced population.

Regarding DTT, the Agreement (*acuerdo*) 002 of 2012 “that establishes and regulates the provision of public service broadcasting of digital terrestrial television, DVB-T” was published on 4 April 2012. This agreement is framed by the Television Law (185 of 1995), in which public service obligations are well defined (see section 2.2.2). The agreement does not establish any particular provisions for digital television regarding public interest.²³¹

Public Consultation

As mentioned before, Colombians are not well informed about the television digitization process. As of October 2010, only 31 percent of the population knew something or had heard something about DTT (see section 1.2.1).²³² Mr Coronell says that people are not “tuned” to television digitization, and that the public communication campaigns by the government on digital television have been insufficient.²³³ Despite the fact that television is the most consumed media in the country, the substitution of analog technology does not seem to be a matter the average citizen is interested in. Civil society groups do not seem to be engaged in this matter either. On the other hand, internet regulation does stir interest and public debate, especially in social media.

However, CNTV and the MinTic have launched an outreach campaign and published some draft policy documents for public consideration. In December 2010, CNTV published the Draft Technical Agreement on the Implementation of Digital Terrestrial Television (*Proyecto de acuerdo técnico de implementación de la TDT en Colombia*) for the consideration of the telecoms sector.²³⁴ ACIEM pointed out some technical

230. The policy document is included in CNTV, “*Propuesta de Agenda Regulatoria*.”

231. Agreement (acuerdo) 002 of 2012, at <http://bit.ly/RCAxbH> (accessed 11 August 2012).

232. CNTV and ACIM, “*Estudio General de Medios*,” 2010.

233. Interview with Daniel Coronell, Bogotá, 18 December 2010.

234. Document at <http://scr.bi/fjQQCK> (accessed 6 February 2011).

issues for consideration in this document, such as the scalability of coverage, the ongoing monitoring of penetration in terms of signal transmission and reception co-existence, and the definition of the different types of services.²³⁵

According to Ms Abisambra, citizens have not been consulted on content provision for DTT; she also says there is no expectation of a significant increase in the amount of contents produced with the digitization process.²³⁶

Regarding the internet, the MinTic launched an ambitious plan in October 2010 called “Live digital” (*Vive digital*), which was posted online for over a month so that citizens could send their comments and ideas to improve or change internet access.²³⁷ The main objective was to expand the use of the internet. In February 2011 the MinTic presented the final version of the policy, including people’s ideas, which is also published on the *Vive digital* site.

7.1.2 The Internet

Regulation of News on the Internet

The Political Constitution guarantees press freedom as a fundamental right (see section 4.2.2). There is currently no specific regulatory framework for news on the internet and mobile platforms.²³⁸

The only content regulation established for the web is for child pornography.²³⁹ Law 679 of 2001 intends to “prevent and counteract child exploitation, pornography, and sex tourism, according to the 44th article of the political constitution.”²⁴⁰

Legal Liability for Internet Content

On 4 April 2011, the Ministry of the Interior (*Ministerio del Interior*), acting on behalf of the Intersectoral Commission on Intellectual Property (*Comisión Intersectorial de Propiedad Intelectual*, CIPI), filed a bill that establishes liability for infringement of copyright and related rights on the internet (the bill was informally called Ley Lleras, after the minister). In brief, the bill intended to penalize anyone who sells, offers or provides for marketing purposes creations protected by copyright. The bill did not clearly refer to the final user liability, but did intend to give internet service providers the power to remove or block “illegal” contents.

235. CNTV press release, at <http://bit.ly/gLCOJe> (accessed 6 February 2011).

236. Interview with Salua Abisambra, Bogotá, 10 February 2011.

237. See <http://vivedigital.gov.co/page/material-de-vive-digital> (accessed 6 February 2011).

238. Although these are not specifically content regulations, Colombian law considers as crimes defamation, incitement to commit crimes, financial panic, and several national security offenses, such as the revelation of political or military secrets.

239. See “*Marco legal contra la pornografía infantil*” (Regulatory framework regarding child pornography), at <http://www.internetsano.gov.co/normatividad.html>. (accessed 7 February 2011).

240. Law 679 of 2001, *Diario Oficial* No. 44.509, 4 August 2001, at <http://bit.ly/iNGeog> (accessed 7 February 2011).

The bill was highly controversial among internet users. However, Juan Carlos Monroy, director of the National Directorate of Copyright (*Dirección Nacional de Derechos del Derecho de Autor*, DNDA), stated that “the goal is not to penalize the accessing or downloading of content ... In general, internet users are not responsible for copyright infringement simply by downloading, access or share content.”²⁴¹ After various debates, the bill was rejected by Congress in November 2011.

In April 2012, Congress approved a bill for the Colombia—United States TLC implementation. The bill included some articles related to online copyright. Article 13, the most polemical, prohibits “the retransmission over the Internet of television signals ... without the consent of the holder of the copyright of the content of the signal or, if it is the case, of the signal itself.”²⁴² This law (informally called *Ley Lleras 2*) generated public debate in the media. However, this bill has not the same scope as the original *Ley Lleras* did, and the government has stated that this law neither considers the removal of infringing copyright material nor regulates the liability of internet service providers, as the previous bill did.²⁴³ Indeed, the bill does not mention the legal liability of internet service providers, as the *Ley Lleras* did.

Regarding private data online, users’ private data protection is regulated as it is related to one of the constitutional fundamental rights, the right to privacy. Art. 15 of the Constitution says: “Everybody has the right to personal and familiar privacy ... Mail and any other ways of private communications are inviolable.”²⁴⁴ Law 1266 of 2008 develops this constitutional right, as it regulates the management of personal information databases, such as financial and commercial information.²⁴⁵

7.2 Regulators

7.2.1 Changes in Content Regulation

There are three main media regulators in Colombia:

1. CNTV, created in 1995 by Law 182 as an autonomous and independent regulatory organization (as referred to in Arts. 76 and 77). According to Art. 4 of Law 182, CNTV is meant to “exercise, on behalf of the state, ownership of public service television, to lead television policy, to develop and implement State plans and programs of the State in relation to the television public service as determined by the law, to regulate television service, and to intervene, manage and control the electromagnetic spectrum used for the provision of such services, in order to guarantee media pluralism, competition and efficiency in service delivery, and prevent monopolistic practices in operation and exploitation, in terms of the Constitution

241. Mauricio Jaramillo, “18 preguntas (y respuestas) sobre el proyecto antipiratería en Colombia” (18 questions (and answers) about the anti-piracy project in Colombia), *Revista Enter.co*, at <http://bit.ly/eUzbzRH>, posted 7 April 2011 (accessed 9 April 2011).

242. See *Proyecto de Ley 201* de 2012 at <http://scr.bi/GCTPtg> (accessed 21 May 2012).

243. See *Lasillavacia.com*, at <http://bit.ly/Ireylc> (accessed 21 May 2012).

244. Political Constitution of Colombia, at <http://bit.ly/dCF8Fp>, Title II, Art. 15, p. 3 (accessed 8 February 2011).

245. Law 1266 of 2008, *Diario Oficial* No. 47.219, 31 December 2008, at <http://bit.ly/g145OT> (accessed 8 February 2011).

and the law.” In April 2012 the CNTV was liquidated and the ANTV was created (see section 7.2.2). According to Law 1507,²⁴⁶ the new authority is meant to “provide the tools for implementing plans and programs for the provision of television public service in order to ensure access to television, in order to guarantee pluralism and impartiality of information, competition and efficiency in service delivery, and prevent monopolistic practices in its operation and exploitation, in terms of the Constitution and the law.”

2. The CRC, created in 1992 also in the framework of the 1991 Political Constitution, regulates mainly market issues for fixed and mobile telephony, and the internet.
3. The MinTic (called the Ministry of Communications before Law 1341 of 2009) regulates radio, mainly on technical issues.

Content regulation is a sensitive issue, since freedom of the press and freedom of expression are fundamental constitutional rights (see sections 4.2.2 and 7.1.2.1). Therefore, all content regulation has to be compatible with the Political Constitution and the Inter-American Human Rights System,²⁴⁷ and no prior control or censorship can be implemented. The main media regulation in Colombia addresses media business and market issues, and technical issues, but not media content.

As mentioned before, there is no special regulatory frame for digital media content apart from the prohibition of child pornography (see section 7.1.2.1). However, there is some regulation for television, as it is considered a public service under the control and regulation of the State. According to Law 182 of 1995, the main goals of the television service are to educate, to truthfully inform, and to entertain in a healthy way. Television content has to respect other fundamental rights (such as honor, good name, and privacy) and pay respect to political, religious, and cultural differences. The law includes among other regulations, a mandatory share of 70 percent of national production television in prime time for national open television channels, and a share of 50 percent for regional open television channels (Article 33). (For public service obligations for private media, see section 2.2.2.)

Law 182 states that television advertising and programming will not be subjected to prior control or censorship.²⁴⁸ However, CNTV, as overseer, would be able to regulate content in order to improve quality and guarantee the public service of television, and to protect families and vulnerable people such as children and youths.

7.2.2 Regulatory Independence

In legal terms, both ANTV (the former CNTV) and the CRC are independent and autonomous structures. However, there has been a lot of criticism, particularly of the CNTV, which people consider to be a highly politicized organ. A 2006 report by the Communication Center for Latin America (*Centro de Competencia*

246. Law 1507 of 2012, at <http://bit.ly/KbfJUu> (accessed 21 May 2012).

247. See <http://www.hrea.org>

248. Law 182 of 1995, Chapter 2, Title 3, at <http://bit.ly/f60iik> (accessed 1 April 2011).

en Comunicación para América Latina) of the Friedrich Ebert Foundation in Colombia (FESCOL) analyzed CNTV 10 years after its creation.²⁴⁹ The report's main conclusion was that although an independent regulator was crucial, CNTV had to be restructured, because throughout the decade there had been constant debate over political influence, corruption, irregular favoritism, and public disparagement of the entity.

A lot of the criticism about the lack of autonomy of the now defunct CNTV has been related to the election process of the commissioners. According to Law 182, the television commissioners were elected as follows: two members designated by the government; one member chosen from delegates of regional channels; one member representing the professional associations and unions connected to television; and one member representing parental organizations, communication and journalism schools, and audience organizations. However, the autonomy was been threatened as the commissioners' selection process was politicized and there were irregularities in the appointments, especially of the representatives of the professional, parental, audience, and journalism schools associations. A common criticism was that commissioners were chosen as part of political quotas and not for their expertise or for their ability to represent the interests of a group of stakeholders.

On various occasions, the polemic has led the government to propose the elimination of CNTV. In 2008, the government announced a bill to reform CNTV, which was intended to give it a more technical than political profile, and remove the commissioners from the financial management of resources. It also intended to modify the rules for commissioners' appointments. This bill failed to become law. In August 2010, the government filed a bill in Congress to close CNTV.²⁵⁰ In June 2011, after the bill was approved by Congress, the government passed an Act to close it. In August 2011, the government presented a new Television Law bill to the congress. The bill was approved and in April 2012 the CNTV was liquidated and the ANTV was created.

The ANTV is now in charge of the new tender for the third channel and, in order to guarantee transparency, the government has said that an external investment bank will define the tender in financial, technical and legal terms.²⁵¹ In comparison with the CNTV, the ANTV will be a smaller agency with a lower operation budget, and a more strict selection process for the board of directors and the employees.²⁵² It will also be a less powerful regulator as some of the functions of the former CNTV will be redistributed among other government agencies, such as the National Spectrum Agency (*Agencia Nacional del Espectro*, ANE) the Communications Regulation Commission (*Comisión de Regulación de Comunicaciones*, CRC), and the Industry and Commerce Authority (*Superintendencia de Industria y Comercio*).²⁵³

249. Angela María Riaño, "La Comisión Nacional de Televisión, 1665–2006" (National Television Commission 1665–2006), FESCOL, at <http://bit.ly/eT3nDz> (accessed 15 February 2011).

250. The full text of the bill can be found at <http://bit.ly/fnv7P7> (accessed 15 February 2011).

251. See Portafolio.co at <http://bit.ly/MqRlCe> (accessed 11 August 2012).

252. See El Espectador.com at <http://bit.ly/P6jZs9> (accessed August 11 2012).

253. Law 1507 of 2012, at <http://bit.ly/KbfjUs> (accessed 21 May 2012).

7.2.3 Digital Licensing

In Colombia, licenses are required for radio and television, as these media use the electromagnetic spectrum, defined by the Constitution as a public good subject to the state's control in order to guarantee access equity and avoid monopolies.²⁵⁴ Licenses are awarded for 10 years and are renewable.

Radio Licensing

In Colombia, there are three kinds of radio broadcasters: commercial radio, public interest radio, and community radio. All radio broadcasting licensing is managed by the MinTic. Commercial radio licenses are awarded by tenders (*licitaciones*). Community radio licenses are awarded by public announcements (*convocatorias públicas*), and public interest radio licenses are awarded directly to national or local state institutions.²⁵⁵ The ministry is in charge of the call for bids, the public announcements, the awarding of radio frequencies, and the control of broadcasters. Bidders for commercial radio are private companies; bidders for public interest radio are the public radio system (RNC and Radiónica), the military forces, universities, and the indigenous population; and for community radio, social organizations with a local range of action, mainly in rural areas. However, in March 2009 the MinTic awarded for the first time 13 radio frequencies to community radios in big cities.

Community radio is particularly important in Colombia, as the country is a pioneer in Latin America in activism and regulation for this kind of radio station. Broadcasting licensing for community radio has been regulated since 1997. Generally speaking, awarding criteria are clearly laid out in public announcements (*convocatorias públicas*), and the law sets general requirements for community broadcasters.²⁵⁶ However, community broadcasters have sometimes complained of lack of transparency in the awarding of some licenses, and about some of the specific regulations for this kind of stations, explains Mónica Valdés, a researcher and a community radio expert.²⁵⁷ Some controversial issues in community radio broadcasting are that there is only one community broadcaster allowed per town, while several commercial broadcasters are allowed; indigenous people may be considered for bids for public interest radio, but they cannot be given a community radio license; and community stations cannot link transmissions (*enlazar transmisiones*) to create networks, while commercial stations can.

Television Licensing

Until April 2012, television licenses were awarded and renewed by CNTV, and from then on they are awarded by the ANTV. In recent years, there has been a big controversy regarding the awarding of a third private channel license, since until now there have only been two private open television channels. A bid, called for in 2007, has been suspended by the State Council (see section 5.1.2).

254. Political Constitution of Colombia, Art. 76, at <http://bit.ly/dCF8Fp>.

255. FLIP and National Endowment for Democracy (NED), "*Fuera del Aire. Censura radial en Colombia*" (Off-air: Radio Censorship in Colombia), 2010, at <http://bit.ly/bScvIB> (accessed 8 April 2011) (hereafter FLIP and NED, "*Fuera del Aire*").

256. Decree (*Decreto*) 1981 of 2003, at <http://bit.ly/exESro>; Decree (*Decreto*) 4350 of 2009, at <http://scr.bi/ijV6k0> (accessed 15 February 2011).

257. Interview with Mónica Valdés, Bogotá, 15 February 2011.

7.2.4 Role of Self-regulatory Mechanisms

In 2010, CNTV proposed an agreement, addressing content in free-to-air television, which would include a proposal for media self-regulation.²⁵⁸ The proposal encourages channels to create a self-regulatory system that includes, for example respect for program schedules, a policy regarding information and opinion treatment, a distinction between opinion, information, and advertising, and a greater role for news ombudsmen.

In February 2012, the National Media Association (*Asociación Nacional de Medios*, Asomedios) presented a self-regulation code signed by the free-to-air television broadcasters.²⁵⁹ Some of the most relevant points of the code are as follows:

- The contents and their treatment must conform to the classification and schedules of programming.
- Television broadcasters will give accurate, objective, impartial and timely information, and refrain from posting morbid images or information that attack the morality and sensitivity of viewers.
- Language referring to non-judicially sanctioned people must be conditional, noting the lack of certainty about their guilt, respecting the presumption of innocence.
- Opinion should be clearly separated from the facts on which such opinion is based. There should be a clear distinction between the facts and the opinion of the journalists that recounts them.

Law 335 of 1996 established that private channels have to dedicate a space on their programming (chosen by them) to news ombudsmen.²⁶⁰ Channels respect this regulation, although these programs are usually broadcast after midnight, with very low audiences. Ms Cepeda and Amparo Pérez, news ombudsmen for Canal Caracol, are both respected and experienced journalists acting as news ombudsmen, who receive and answer all the communications and complaints over content sent by the audience, and they organize debates on specific topics addressed in some of the audience complaints (for example, the representation of women in a soap opera, or the representation of prison guards in a series).

7.3 Government Interference

7.3.1 The Market

As has been discussed, the licensing of television and radio frequencies can become a threat to media independence. Although the government can exert pressure, this is not as strong as in some other Latin American countries, says Mr Cortés (see section 7.2.3).²⁶¹ However, there is another source of interference by state power: state advertising. The government invests many resources in media advertising. In the national media the percentage of revenue received through state advertising might not be that high, but in regional

258. Agreement 3 of 2010, *Diario Oficial* No. 47.702, 7 May 2010, Art. 42, at <http://bit.ly/i8T3gB> (accessed 13 June 2011).

259. See the document at <http://bit.ly/OTPhj4> (accessed 11 August 2012).

260. Law 335 of 1996, *Diario Oficial* No. 42.946, 24 December 1996, Art. 12, at <http://bit.ly/RJRhiR> (accessed 13 June 2011).

261. Interview with Carlos Cortés, Bogotá, 11 February 2011.

media local government is the main advertiser and many small media depend on official advertising for their subsistence.

A 2008 report by the Open Society Institute and Civil Rights Association covering seven Latin American countries revealed that the abuse of official advertising is a tool of pressure and subtle censorship to generate favorable coverage and discourage critical and watchful approaches to information about local and regional power. “Measurements from 2005, 2006 and 2007 reveal that the government of President Uribe made regular and suspiciously large advertising investments in the economic newspaper *La República* which is usually favorable to the government policies, although it does not have a high readership,” was one of the examples presented on the report.²⁶²

Commercial radio operators can lease space to third parties. Therefore, many journalists rent radio spots to broadcast their news programs without any employment relationship with radio stations. Journalists who lease radio spots work independently, but at the same time they are responsible for selling advertising to finance their programs. Some journalists, especially in the regions, complain that the cost is very high. Thus they have to obtain a lot of money in advertising, compromising their independence, since many of these ads come from official sources. Journalists claim that critical information about the local government can lead to an advertising veto of their programs, as have been documented by the Foundation for Press Freedom (FLIP).²⁶³

7.3.2 The Regulator

The most significant case of abuse of a regulatory power is the alleged corruption and lack of independence of CNTV. As previously described (see section 5.1.2), CNTV was considered a highly politicized organism, as the regulatory body has been accused of corruption and irregular favoritism. The most recent case is concerned with the awarding of a third private channel license. After an excessively lengthy process that included investigations from the Comptroller and Auditor General and Attorney General (*Contraloría General y Procuraduría General*), on July 2010 the State Council decided to suspend the adjudication of the license because of all the irregularities in the process (see section 5.1.2).

7.3.3 Other Forms of Interference

A recent case of illegal state interference in the media is “Eavesdropping by the DAS” (*Interceptaciones ilegales del Departamento Administrativo de Seguridad, DAS*) (see section 4.2.2). Since February 2009 various media reported that the DAS was illegally spying, threatening, and creating smear campaigns (*campañas de desprestigio*) against journalists, opposition politicians, and judges of the Supreme Court. Two years later, criminal investigations have confirmed these media complaints, and so far two former senior managers of the DAS have been condemned by the Superior Court of Bogotá (*Tribunal Superior de Bogotá*), and 52 DAS officials are under investigation by the Attorney General.

262. OSI and Civil Rights Association, “*El precio del silencio*,” p. 11.

263. FLIP and NED, “*Fuera del Aire*.”

One of the most dramatic cases is that of Claudia Julieta Duque, a journalist from Cali. Duque had been investigating the murder of Jaime Garzón, a journalist and political humorist shot in Bogotá in 1999, and had alleged DAS's responsibility for the crime.²⁶⁴ The Attorney General has evidence that because of her journalistic work she and her daughter have been threatened by the DAS since 2002. One of the pieces of evidence in this case is a "Manual to threaten" (*Manual para amenazar*) that DAS officers used for phone call threats and illegal spying on Ms Duque and her daughter.²⁶⁵

This case is not unique, as there are other forms of interference. The FLIP has identified, among common forms of public interference, the stigmatizing accusations and public statements from public servants about journalists and media, as well as threats and abuse from public servants, the police and military forces.²⁶⁶

7.4 Assessments

The policy and regulatory framework for digital media is still being defined. Some experts agree that the state should only regulate the market and the contents should remain free, in order to respect press and information freedom. On the other hand, others think that good regulation can stimulate the market. For example, open television channels currently have a mandatory share of 70 percent of national television production during prime time,²⁶⁷ and this has promoted national production and has made private channels into solid companies with product demand in the international market.

There are various perspectives on what kind of regulation should be drawn up for digital content. Mr Cortés believes the state should assume a more active role in regulation in order to diversify content, as digitization will not bring on pluralism *per se*.²⁶⁸ There should be public policy to promote certain voices. "If there is not a decided policy, for example, for having more news about and from indigenous groups, no one is going to hear them no matter how many blogs they have," Mr Cortés says.

Mr Rincón thinks digital television can bring important opportunities for diversity as long as there is a content policy oriented, for instance, to stimulate new producers. "But there is no citizens' project on this. The communicative stuff is governed by the market."²⁶⁹

264. For more on Jaime Garzón, see "*Un adiós de carnaval*" (A carnival-like goodbye), a profile by a journalist and personal friend of Garzón, Antonio Morales, at <http://bit.ly/8E0gAQ> (accessed 13 June 2011).

265. FLIP, "*Espionaje contra periodistas*," Margarita Martínez, "*Espionaje, presiones e intimidaciones al relato periodístico*" (Espionage, pressure, and intimidation toward news), in "*Por qué nos odian tanto?: Estado y medios de comunicación en América Latina*" (Why do they hate us?: State and media in Latin America), Communication Center for Latin America (*Centro de Competencia en Comunicación para América Latina*), FESCOL, 2010, at <http://bit.ly/gAexo0> (accessed 13 June 2011).

266. FLIP, *Informe sobre el estado de la libertad de prensa en Colombia 2008* (Report on the state of press freedom in Colombia 2008), at <http://bit.ly/dNroSC> (accessed 11 August 2012).

267. Law 182 of 1995, Chapter 2, Title 3, at <http://bit.ly/gWd7Ir> (accessed 1 April 2011).

268. Interview with Carlos Cortés, Bogotá, 10 December 2010 and 11 February 2011.

269. Interview with Omar Rincón Bogotá, 22 December 2010.

There is not yet a special licensing policy for digital media. As for analog media, television licensing has very recently been controversial because of the third private television channel adjudication process (see section 5.1.2). The regulatory framework itself is functional, but there are several procedural flaws in the implementation.

There is no evidence to affirm that government influence has changed in recent years. However, it is clear that digital media, and the internet in particular, are not yet regulated and even the market structure is so far open, as it is still emerging. Digital media are still new in the country, and so their market and their audience are still taking shape and growing. According to some analysts, since their audience and impact is still marginal, the state has not yet paid much attention to their regulation and they are not seen yet as a counter-power.

In recent years there has been an increase in public consultation on technology and the government's digital communication's plans. For example, in October 2010, the MinTic posted its connectivity plan "Live Digital" (*Vive digital*) online for public consultation, and in December 2010 CNTV published the Technical Agreement Draft on Implementation of Digital Terrestrial Television (*Proyecto de acuerdo técnico de implementación de la TDT en Colombia*) for the consideration of the telecoms sector (see section 7.1.1.4).

It is also worth mentioning the direct interaction that some public officers are seeking with citizens. The case of the MinTic is a good example: the minister, the vice-minister, and some of their closest officers and advisers keep active Twitter accounts through which they communicate with the public.

Digital media are still emerging in Colombia and, as has been mentioned in this chapter, there is not yet a legal framework for digital media. Therefore, it is difficult to tell whether or not the upcoming regulation framework will positively impact diversity and pluralism. However, "Live Digital" is intended to be an important contribution for internet access democratization, as the government is willing to multiply by four the number of internet connections and by three the number of municipalities (*municipios*) with optical fiber networks.

It is important to give continuity to government policies, to increase internet penetration, and especially to reduce the gap between urban and rural areas. The digitization of technology in television does not seem to mean a change in diversity or in policies favoring diversity. As has been explained, we cannot foresee a significant content change or increase—and even less so in public channels.

8. Conclusions

8.1 Media Today

Due to digitization, the production and consumption of information and news have begun to shyly change. Over the past five years journalists and audiences have begun to communicate in different ways. New voices have emerged and media agendas are being built differently. Interest groups (such as environmental activists, war victims associations, or ethnic minorities) and audiences may now have a voice and they are beginning to contribute to the news production cycle.

At the same time, younger journalists are discovering new ways of reporting and, in some cases, telling stories closer to the community's interests. In this context, the internet has brought a new sense of news democracy and political activism that was evident in the last electoral process and that most likely has transformed Colombian politics for good. Internet penetration has grown rapidly, and some pioneer initiatives have opened the way to more independence in the news media. The spread of social media has enhanced opportunities for civil activism and has opened the door to new voices.

However, these positive changes have so far had a minor impact on mass (offline) media. Mostly younger journalists are the ones exploring the new tools and opportunities of internet reporting and storytelling. And only some media, especially the ones that were initiated online, are exploring new agendas and sources of information.

Colombians still get most of their information from television, whose structure remains traditional. Additionally, Colombian media are few for the size of the population. There is still a lot to be done in terms of media diversity, and pluralism has only slightly increased. Digitization has not yet changed the media landscape, and press freedom is still threatened mainly by the internal conflict and by official advertising, especially in rural areas (see section 4.2.2). News agendas have not experienced a severe transformation and online participation remains a marginal activity. Despite the emergence of various media, the market is still dominated by traditional (offline) media enterprises and, more recently, by international conglomerates. This phenomenon, which is a global trend—not exclusive to Colombia or Latin America—brings both positive and negative consequences: on the good side, media gain independence from local political power; on the bad side, market and commercial principles reign over the public and democratic basis of news media.

Given the low rate of digital penetration in Colombia and the fact that digital financing models are just taking shape, the social impact of digitization is still hard to measure. The transformations of media, journalistic work, and audiences' consumption habits have not yet reached their climax. Digitization breaks previous competition dynamics and may be seen as a threat by those who have traditionally benefited from the analog era. Evidence has shown that the telecoms and media sector in Colombia exerts big political and economic pressure and the switch-over to a more plural model will not be an easy or fast process. Media keep strong ties with political power and the matter of independence does not seem to be altered by digitization.

8.2 Media Tomorrow

As media consumption habits change, journalism and media are meant to keep pace. In the coming years, internet penetration is expected to keep growing rapidly, and digital television will begin operations. However, as has been discussed, technology does not bring solutions on its own, it just brings the opportunities. There are still questions that remain open, such as the subsidies for the DTT equipment and the reinforcement of national television and radio content production. Also, given the complex Colombian geography, a successful analog switch-off will depend on an effective coverage policy.

The implementation of DTT may change the way many Colombians, especially in rural areas (which have never had a good-quality analog signal), approach information and entertainment. However, there is some uncertainty regarding television in Colombia. With the recent liquidation of the National Television Commission (CNTV) and the controversy around the third channel license, doubts have arisen concerning the administration and development of the new DTT service. The new regulator, the ANTV, faces the big challenge of winning respect and legitimacy, and making TV digital transition happen.

As traditional media are comfortable with a business model that works, the way to diversity, independence, and good-quality news is for emerging internet media to grow in number and audience. And that audience may also grow in quality, as it takes advantage of internet tools for becoming more critical, better-informed, and active citizens.

A helpful practice for independence and journalistic quality would be to understand and practice the difference between a profit model for business and a sustainable model for news media.

9. Recommendations

9.1 Policy

9.1.1 Media Policy

9.1.1.1 Content Policy for the Digital Era

Issue

The digitization of public television has been conceived mainly in technical terms, while the creation of new content has not yet been considered. Media experts agree that the advent of digital television provides an opportunity to increase the diversity of voices in the media landscape and the visibility of social minorities, including indigenous and African-Colombian communities, LGBTI groups, and victims of the armed conflict, among others—if a proper content policy is developed.

Recommendation

The National Television Authority (*Autoridad Nacional de Televisión*, ANTV) should devise a content policy for digital public television, drawing on good practices from other countries. Such a policy, in the context of the advent of digital television, will help to increase the diversity of voices if it includes, for instance, incentives (in the form of subsidies and tax relief) for new and independent producers to boost competition among audiovisual creators, and the creation of regional content production centers.

9.1.2 Internet Policy

9.1.2.1 Reducing the Digital Divide

Issue

Given the geography of the country, the gap between urban and rural areas, and the unequal distribution of wealth among Colombians, success in the introduction of new and digital media will depend on the government's ability to increase digital access. The ministry launched an ambitious online connectivity plan in 2010 whose continuation beyond the mandate of the current government is crucial for the future of digitization in Colombia.

Recommendation

The connectivity plan that is being implemented by the government should prioritize the narrowing of the digital divide. In particular, the Ministry of ICT (*Ministerio de Tecnologías de la Información y las Comunicaciones*, MinTic) should develop and implement strategies that ensure digital signal access and take-up, especially in more remote areas. These strategies should cover both digital television (including subsidies for the purchase of set-top-boxes) and the internet (measures should include flat or subsidized rates for internet and mobile access, and subsidies for the purchase of computers and mobile devices).

9.2 Media Law and Regulation

9.2.1 Regulation

9.2.1.1 Television License Allocation

Issue

Economic and political pressures have had a negative impact on transparency and fairness in the allocation of television licenses.

Recommendation

The new television regulator, ANTV, should ensure that the upcoming broadcast licensing process is transparent, and creates mechanisms to include an active monitoring role for civil society in order to avoid economic and political pressures. The bid and the allocation should be made public, and both private and public media should support the visibility of the process. Furthermore, MinTic and ANTV should, in accordance with Law 182 of 1995, guarantee the diversity of operators.

9.3 Public Service in the Media

9.3.1 Reinforcing the Public Interest in the Media

Issue

Economic and political pressures, and competition in the new digital market, may allow economic interests to prevail over the social needs for information. Public national and regional channels need to catch up with private channels to become attractive to the public and thus fulfill their task of educating and strengthening the nation's social values. To that end, they need to find an appropriate formula for combining audience-driven content with public interest content.

Recommendation

MinTic and ANTV should adopt new structures and introduce new models of funding for the public service media. The existing Television Fund may be enlarged to cover such needs as the digitization of equipment and networks. To reinforce national television production, MinTic and the Spectrum Agency (*Agencia Nacional del Espectro*, ANE) should replicate in public television a strategy similar to the country's film policy, which

has successfully promoted a quality film industry.²⁷⁰ The resources of the Technology, Science and Innovation Fund²⁷¹ should be used to reduce the digital divide and to strengthen regional television production in order to create attractive, high quality content that increases audience interest in public media. (*See 9.1.1.1 Content Policy for the Digital Era.*)

9.4 Digital Media Literacy

9.4.1 Public Information Campaigns

Issue

The first stage of digital television deployment has focused on technical matters. There was virtually no public information outreach or public participation in this process.

Recommendation

ANTV and MinTic should launch public campaigns aimed at informing the public about the emerging digital services, including the use of set-top boxes, prices of digital devices, and other consumer-related matters. In parallel, television channels themselves should launch communication campaigns to explain the changes that digitization is set to trigger in their programming. Other media, including newspapers and radio stations, should participate in these information campaigns.

9.4.2 Boosting Digital Literacy

Issue

Media analysts have noted that the curricula in most journalism schools still focus almost exclusively on analog media.

Recommendation

The National Ministry of Education (*Ministerio de Educación Nacional*, MEN), the Ministry of Culture, and related government agencies such as Colciencias (the Department of Science, Technology and Innovation) should introduce digital literacy courses in both primary and secondary education. In rural areas, joint programs between public and private schools on digital literacy should be supported by the newly-introduced Technology, Science and Innovation Fund.

At the same time, MEN should require universities to accelerate curriculum reform to address the challenges and dynamics introduced by digitization, including journalistic duties, practices and responsibilities. New curricula should include courses on technical matters (software and equipment), storytelling techniques and resources in online journalism, and consumer studies (for example, on changes in audience measurements and the emerging role of netizens).

270. For more on the Film Law, see <http://bit.ly/Jh7EBc>.

271. For more on the Fund, see <http://bit.ly/Kp9T0W>.

List of Abbreviations, Figures, Tables, and Companies

Abbreviations and Acronyms

ANTV	National Television Authority (<i>Autoridad Nacional de Televisión</i>)
ACIEM	Colombian Engineers' Association (<i>Asociación Colombiana de Ingenieros</i>)
ACIM	Colombian Association for Media Research (<i>Asociación colombiana de investigación de medios</i>)
ANE	National Spectrum Agency (<i>Agencia Nacional del Espectro</i>)
ATSC	Advanced Television Systems Committee
CEET	Casa Editorial El Tiempo
CIPI	Intersectoral Commission on Intellectual Property (<i>Comisión Intersectorial de Propiedad Intelectual</i>)
CNRR	National Commission for Reparation and Reconciliation (<i>Comisión Nacional de Reparación y Reconciliación</i>)
CNTV	National Commission of Television (<i>Comisión Nacional de Televisión</i>)
CODHES	Consulting Office for Human Rights and Displacement (<i>Consultoría para los Derechos Humanos y el Desplazamiento</i>)
CRC	Regulation Commission of Telecommunications (<i>Comisión de Regulación de Comunicaciones</i>)
DANE	National Statistics Department (<i>Departamento Administrativo Nacional de Estadística</i>)
DAS	Administrative Department of Security (<i>Departamento Administrativo de Seguridad</i>)
DIAN	National Taxes and Customs Department (<i>Dirección de Impuestos y Aduanas Nacionales</i>)
DNDA	National Directorate of Copyright (<i>Dirección Nacional de Derechos del Derecho de Autor</i>)
DTT	Digital Terrestrial Television
ECAR	Colombian Report for Radio Audience (<i>Estudio colombiano de audiencia radial</i>)
EIB	European Investment Bank
EIP	public interest radio stations (<i>Emisoras de Interés Público</i>)
FDTV	Television Development Fund (<i>Fondo para el Desarrollo de la Televisión</i>)
FESCOL	Friedrich Ebert Foundation in Colombia (<i>Friedrich Ebert Stiftung en Colombia</i>)
FLIP	Foundation for Press Liberty (<i>Fundación para la Libertad de Prensa</i>)

IBOPE	Brazilian Institute of Public Opinion and Statistics (<i>Instituto Brasileiro de Opinião Pública e Estatística</i>)
ICT	information and communication technology
IDMC	Internal Displacement Monitoring Centre
IESE-CELA	Institute of Higher Business Studies (<i>Instituto de Estudios Superiores de la Empresa</i>)-Center for Enterprise in Latin America
IMF	International Monetary Fund
IMT	international mobile telecommunication
<i>IPTV</i>	Internet Protocol television
ISI	Information Society Index
ITU	International Telecommunication Union
MinTic	Ministry of Information Technologies and Communications (<i>Ministerio de las Tecnologías de la Información y las Comunicaciones</i>)
NED	National Endowment for Democracy
NGO	non-governmental organization
RCN	National Network Radio (<i>Radio Cadena Nacional</i>)
RNC	Colombian National Radio (<i>Radio Nacional de Colombia</i>)
RTVC	National Radio and Television of Colombia (<i>Radio Televisión Nacional de Colombia</i>)
RUPD	Registry of Displaced People (<i>Registro Único de Población Desplazada</i>)
SME	small and medium-sized enterprise
TLC	Free Trade Treaty (<i>Tratado de libre comercio</i>)
UGC	user-generated content

Figures

Figure 1.	Rural–urban breakdown (% of total population), 2005	10
Figure 2.	Ethnic composition (% of total population), estimated 2011	10
Figure 3.	Religious composition (% of total population), estimated 2011	11
Figure 4.	Media consumption(% of total population), 2005–2010	17
Figure 5.	Pay-TV television consumption (%), 2001–2010.....	18
Figure 6.	Television usage (%), 2005–2010	19
Figure 7.	Readership of general (not specialized) newspapers, 2009–2010.....	20
Figure 8.	General print magazines readership, 2009–2010	21
Figure 9.	Audience share of main radio networks (%), 2007–2010.....	23
Figure 10.	Audience share of general radio stations, 2009–2010.....	24
Figure 11.	Audience for general television channels (%), 2005–2010	25

Tables

Table 1.	Economic indicators.....	12
Table 2.	Households owning equipment, 2005–2011	14
Table 3.	Platforms for the main TV reception and digital take-up in Colombia, 2005–2010 ..	15
Table 4.	Internet penetration rate (total fixed internet subscriptions as % of total population) and mobile penetration rate (total active SIM cards as % of total population), 2005–2010.....	16
Table 5.	Most visited news websites by number of monthly visitors, April 2012.....	23
Table 6.	Leading radio stations by number of listeners of primetime newscasts, 2010	24
Table 7.	Current events and news television programs, December 2010.....	26
Table 8.	Television news programs, December 2010	27
Table 9.	Top 10 most popular sites by number of unique visitors, April 2012	39
Table 10.	Top 10 most popular UGC sites by number of unique visitors, April 2012	40
Table 11.	Top 10 most popular social networks in Colombia, April 2012	41
Table 12:	Distribution of net investment in advertising by sector in million Colombian pesos, 2006–2010.....	74

Companies

América Móvil	E-nnovva
Aval Group	Millicom International Cellular
Bavaria Group	Planeta
Cable Unión	Prisa
Carlos Ardila Lulle Group	Publicaciones Semana
Casa Editorial El Tiempo (CEET)	Santo Domingo Group
Cisneros Group	Telefónica
Colombia Móvil	Telefónica Movistar
Colombia Telecomunicaciones	Telefónica Telecom
Comcel	Telmex
Editorial Televisa	Telmex Colombia
Empresa de Telecomunicaciones de Bogotá, ETB	Uff!
Empresas Públicas de Medellín	UNE-EPM Telecomunicaciones

Mapping Digital Media: Country Reports

1. Romania
2. Thailand
3. Mexico
4. Morocco
5. United Kingdom
6. Sweden
7. Russia
8. Lithuania
9. Italy
10. Germany
11. United States
12. Latvia
13. Serbia
14. Netherlands
15. Albania
16. Hungary
17. Moldova
18. Japan
19. Argentina
20. South Africa
21. Turkey
22. Lebanon
23. Macedonia
24. Bosnia and Herzegovina
25. Poland
26. Montenegro
27. Georgia
28. Nigeria

Mapping Digital Media is a project of the **Open Society Media Program** and the **Open Society Information Program**.

Open Society Media Program

The Media Program works globally to support independent and professional media as crucial players for informing citizens and allowing for their democratic participation in debate. The program provides operational and developmental support to independent media outlets and networks around the world, proposes engaging media policies, and engages in efforts towards improving media laws and creating an enabling legal environment for good, brave and enterprising journalism to flourish. In order to promote transparency and accountability, and tackle issues of organized crime and corruption the Program also fosters quality investigative journalism.

Open Society Information Program

The Open Society Information Program works to increase public access to knowledge, facilitate civil society communication, and protect civil liberties and the freedom to communicate in the digital environment. The Program pays particular attention to the information needs of disadvantaged groups and people in less developed parts of the world. The Program also uses new tools and techniques to empower civil society groups in their various international, national, and local efforts to promote open society.

Open Society Foundations

The Open Society Foundations work to build vibrant and tolerant democracies whose governments are accountable to their citizens. Working with local communities in more than 70 countries, the Open Society Foundations support justice and human rights, freedom of expression, and access to public health and education.

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