MAPPING DIGITAL MEDIA:
URUGUAY

OPEN SOCIETY
FOUNDATIONS

Mapping Digital Media: Uruguay

A REPORT BY THE OPEN SOCIETY FOUNDATIONS

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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: Uruguay Executive Summary

The digital media environment in Uruguay is developing rapidly, due to a small population, sustained economic growth, a policy focus on universal service goals, and a strong legacy of social movements and civil society institutions. But private media ownership remains significantly concentrated in the hands of an oligopoly of wealthy families.

Despite the proliferation of news platforms and outlets, diversity has not increased at all, due to the lack of original and independent online content.

Although digital switch-over is still some way off, television in Uruguay has evolved a great deal since the first digital satellite provider began operations in 2001. In particular, cable has grown rapidly and is now the main platform in just over half of all households. It has filled the gaps in terrestrial signals, particularly near international borders and in remote areas, and thus established television as the definitive universal medium.

The digital transition in terrestrial television began in 2010 and is scheduled to be completed by November 2015. But the licensing process has been marred by political controversy. The government initially envisaged a clean sheet according to which the new spectrum would be open to competitive bids from new entrants in the commercial, community, and public sectors (with proportionate spectrum reserved for each category). The incumbent commercial broadcasters lobbied successfully for automatic frequency rights in 2013; new commercial broadcasters have to compete for too few licenses.

Unlike television, radio has lost audience over recent years, with the total number of listeners declining by 10 percent between 2000 and 2009. The decline represents a net loss for the overall news ecology as it has been concentrated in AM radio where news and information formats are dominant (as opposed to the music-oriented FM band). Print newspapers have experienced a modest decline by comparison, with total circulations falling by 4 percent between 2002 and 2009. However, consumption of news over the internet surpassed that of print news by the end of 2011.

This is not surprising given that the number of households with at least one personal computer (PC) rose significantly between 2004 and 2011, reaching 60 percent of the population, more than two-thirds of which had broadband connections. The government's commitment to digital equity has also had an important impact, with nearly half a million computers provided for public schools by 2011 by the CEIBAL Project. Since April 2012, low-income households in the capital without internet have been offered permanent connections for a one-off payment of UYU 490 (US$25).

The migration of readers from print to digital has not produced an appreciable gain for news diversity, given the limited supply of original journalism online. Four out of the five top news websites are run by legacy newspapers that have been slow to adapt their online editions to the rigors of web journalism. With the exception of the leading national daily, *El País,* there has been only limited use of real-time news cycles or interactive and multimedia features.

Although news websites have established links with social media, users have not shown a strong appetite for consuming news through these platforms. Blogging remains a marginal pursuit and is dominated by topics of personal interest. However, there are signs that blogs and social networks are becoming increasingly important sources for traditional news media, which have demonstrated a willingness to exploit user-generated content. The growth of user participation in the news is in turn reflected in the increasing number of comments and responses to stories that appear on established news sites.

In terms of content, the emergence of two significant online-only news providers has broadened the news agenda to a limited extent, as well as the range of news sources featured in particular stories. This has somewhat enhanced the representation of minority groups and marginal issues, but not to the extent that overall coverage can be considered inclusive.

More gains have been achieved in the development of public television, which has expanded its range of news and information services in recent years, and has provided a boost for locally produced and cultural programming. Although this has coincided with a decline in audience share, digitization is expected to extend the reach of public television with a wider apportionment of frequencies and airtime.

Although public media are all but non-existent online, civil society has established a digital presence which reflects the longstanding tradition of social movements in society more broadly. Mainstream political actors have likewise been quick to exploit digital opportunities to enhance their public profiles. In this sense, digitization has not revolutionized Uruguayan politics, but merely provided additional complementary channels of communication for established groups and individuals.

Digitization has also enhanced journalists' access to sources and increased the number and range of sources available. Although this has not necessarily reduced journalists' reliance on official sources, obtaining documents and data online has fueled investigative reporting to some degree, albeit in newspapers only. Online journalism is on the whole considered unsuited to in-depth or feature-based coverage. This is due to

the speed of the news cycle, scarce resources, and the inexperience of online journalists, whose work in digital newsrooms often serves as an apprenticeship rather than a career path in itself. Thus, unfortunately, time and resource pressures have restricted in-depth journalism.

Part of the problem is that neither online advertising nor pay-walls have proved to be a good source of funding for digital journalism. There is also concern that official advertising lacks transparency and is potentially distorting news markets. Nevertheless, media advertising as a whole has proved robust and largely proof against global recession, with the total spend in 2012 nearly double what it was in 2005.

While growth in advertising has shored up the stability of media markets, it has also solidified the control of three family-owned groups that dominate cross-media ownership. According to a study in 2008, the market leader in television and telecommunications sectors controlled, on average, more than 60 percent of revenues and 56 percent of the audience. The combined average share of the top four operators totaled 89 percent of revenues and 94 percent of the audience. This situation was largely unchanged over the four preceding years, suggesting that the migration of audiences online has not altered dominant media positions. Though there have been more failures than successes in news start-ups, the print title *La Diaria* emerged as a successful new entrant in 2006, centering its business model on a low prepaid subscription fee.

In broadcasting, incumbent operators have lobbied to restrict the scope for new entrants in both radio and digital television. They have only partially succeeded to the extent that the government has agreed to guarantee their own digital frequencies. But the reservation of spectrum for community and public media heralds the potential to enhance diversity and challenge the grip of the commercial incumbents.

However, the hand of community broadcasters is weakened by the Uruguayan Transmission Network (*Red Uruguaya de Trasmisión*, RUTSA), the monopoly transmission company co-owned by the three largest media groups. According to a recent study, RUTSA restricts the scope of local program provision through its control of content distribution in favor of the three main terrestrial operators. There is hope that the development of public media in tandem with digital switch-over will offset the impact of such bottlenecks. A new project in 2013 aimed at consolidating public media is seen as a positive step in this direction.

 In terms of content initiatives, a project called "Tree" (Árbol) has promoted the self-expression of communities through audiovisual media and supporting social inclusion and local development since 2003.

At the same time, the government has imposed new public obligations on commercial television, including requirements to allocate 15 minutes of airtime daily to public service campaigns in areas such as health and education, and to include in their programming free access to interactive e-government services. Among the controversial provisions is a levy on commercial broadcasters to support the new Fund for Audiovisual Production and Digital Television Applications.

Recent reforms have also improved the transparency and independence of broadcast licensing procedures (although the government still retains significant control over the award of spectrum), and a new press law

in 2012 dealt a favorable hand to independent journalism. In particular, it decriminalized the vilification of national symbols and offenses to the honor of foreign political leaders and introduced a public interest defense against charges of defamation and slander by state officials.

Along with a fairly broad access to information law in 2007, these measures have finally blown the cobwebs off the military dictatorship that ended in 1985 and provided the framework for a more democratic digital media future. More needs to be done, however, to ensure this potential is realized, particularly in respect of ownership concentration and regulatory independence.

Beyond the difficulties related to communication policies over the past five years, initiatives such as the Law on Community Broadcasting, the Decree Law on Digital Television, and the bill on Audiovisual Communication Services Law are important achievements towards the democratization of the spectrum and the whole media landscape.

Context

Uruguay is traditionally considered a country with a significantly high level of human development within the regional context of the Southern Cone of Latin America.[1] Compared with its neighbors, it is a small country with a population of 3.2 million and a territory of 176,215 km².[2]

At present, Uruguay is the Latin American country with the largest proportion of emigrants. According to official estimates, 12.8 percent of the population resides abroad.[3] The most sought destinations by Uruguayan emigrants have included Argentina, Spain, Italy, and the United States. In the 1970s, most Uruguayans who left the country were political exiles, and the scale of migration between 1990 and 2002 was a consequence of the country's socio-economic decline that led to the financial crisis of 2002. The scale of the diaspora also reflects the historical scale of immigration; most descendants of such immigrants—mainly those of Spanish or Italian ancestry—still have double citizenship.[4]

The population considered of white descent amounted in 2011 to 88 percent of the total, with the population of African or black descent being only 4.6 percent. Other ethnic groups are virtually non-existent. The official language is Spanish, spoken by the whole population, though along the Brazilian border a dialect known as *portuñol*, a mix of Spanish and Portuguese, is used informally.

It is important to point out the country's strong trend toward urban concentration and a drastic abandonment of rural areas: almost 95 percent of the population lived in 2011 in urban areas.

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1. The Southern Cone is usually understood to comprise Argentina, Chile, Paraguay, and Uruguay.

2. National Water Resources Agency (*Dirección Nacional de Recursos Acuáticos*, DINARA), at http://www.dinara.gub.uy/web_dinara/index.php?option=com_content&view=article&id=61&Itemid=82 (accessed 14 October 2012).

3. A. Pellegrino and D. Macadar, "*Informe Temático sobre migración internacional en base a los datos recogidos en el modulo de migración*" (Thematic report on international migration based on data from the migration module), National Statistics Institute, UN Population Fund, and United Nations Development Programme (UNDP), 2006, pp. 13, at http://www.ine.gub.uy/enha2006/informe%20Migraci%F3n%20ENHA%202006.pdf (hereafter, Pellegrino and Macadar, "*Informe Temático sobre migración internacional*") (accessed 26 February 2011).

4. Pellegrino and Macadar, "*Informe Temático sobre migración internacional.*"

Administratively, Uruguay is divided into 19 departments, one of which is the capital, Montevideo. Uruguay has been a pioneer, among Latin American countries, in separating the state from religion. Official laicism is also an indication of the lower level of religiousness among Uruguayans by regional standards. Nonetheless, among religious Uruguayans, the majority are Catholics (45 percent), followed by 30.1 percent of the population who define themselves as believers in God but not practicing any particular religion.

The political system is based on a representative democracy with a presidential government, with high voter turnout at elections, and a strong adherence to traditional political parties. Four of these parties have representatives in Parliament: the Broad Front (*Frente Amplio*), the National Party (*Partido Nacional*), the Colorado Party (*Partido Colorado*), and the Independent Party (*Partido Independiente*). At present, the Broad Front, the main leftist party, is exercising its second presidential mandate, following the dominance of the National and Colorado parties throughout the 20th century.

Uruguay was governed by a military dictatorship from 1973 to 1985, which resulted in the kidnapping, torture, and murder of real or suspected opponents of the regime and numerous other violations of human rights. Human rights have been included in the public agenda as a disputed matter, and initiatives have been introduced both in favor of and against legal punishment for torture, which have also prompted persons who supported the dictatorship to flee abroad. An amnesty act, the Law of Expiration of the Punitive State, applied since 1989, has prevented the indictment of members of the military government in relation to political crimes committed during the dictatorship. Since the rise to power of the Frente Amplio party, prosecution trials have been held for the military involved in offenses classified as crimes against humanity that are not covered by the amnesty law. A search for the individuals who "disappeared" during the dictatorship has also been undertaken. Some perpetrators were identified, and of these some were brought to trial.

The economic situation in the period 2005–2010 was marked by continued economic growth as part of a process that followed the significant drop in GDP in 2002, which was the result of the profound socio-economic and financial crisis. By the end of the decade, the country had reached its highest peak in growth and the lowest unemployment rate in its history. According to the International Labour Organization (ILO), the crisis in Europe, and more specifically in the Eurozone, neither hindered Uruguay's growth nor affected exports very much. Nevertheless, forecasts for 2013 warn of a possible deceleration in economic growth.[5]

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5. International Labour Organization (ILO), "Frente a la crisis en Europa: reflexiones para el caso de Uruguay" (Facing the crisis in Europe: reflections on the case of Uruguay), at http://www.ilo.org/wcmsp5/groups/public/---americas/---ro-lima/documents/article/wcms_206245.pdf (accessed 12 April 2013).

Social Indicators

Population: 3.2 million (2011)[6]
Households: 1.34 million (2010)[7]

Figure 1.
Rural–urban breakdown (% of total population), 2011

Rural, 5.3

Urban, 94.7
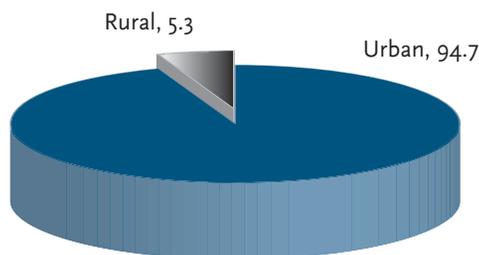
Source: Based on data from the 2011 Population, Households and Housing Census by the National Statistics Institute (*Instituto Nacional de Estadística*, INE), 2012[8]

Figure 2.
Ethnic composition (% of total population), 2011

Other, 7.4

Afro-black, 4.6

White, 88.0
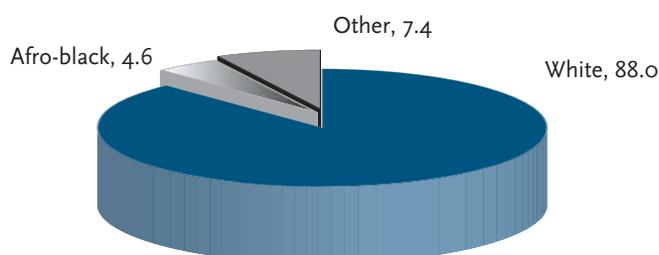
Note: The category "Other" includes Asians, indigenous people, and people who preferred not to reveal their ethnic background
Source: 2011 Population, Households and Housing Census by the INE, 2012

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6. 2011 Population, Households and Housing Census by the National Statistics Institute (*Instituto Nacional de Estadistica*, INE), at http://www.ine.gub.uy/censos2011/index.html (accessed 21 May 2013).

7. 2011 Population, Households and Housing Census by the National Statistics Institute (*Instituto Nacional de Estadistica*, INE), at http://www.ine.gub.uy/censos2011/index.html (accessed 21 May 2013).

8. See http://www.ine.gub.uy/censos2011/index.html (accessed 21 May 2013).

Figure 3.

Religious composition (% of total population), 2011

Agnostic, 2.0   Other, 1.2

Believers in God, 30.1

Catholic, Christian, 45.7

Atheist, 12.0

Non-Catholic, Christian, 9.0
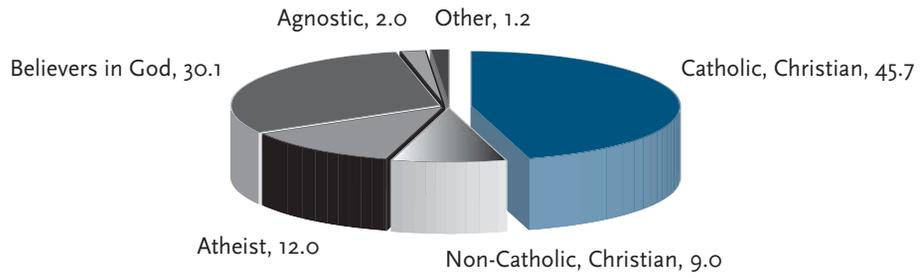
Note: "Other" includes animistic, Umbanda, and Jewish

Source: Calculated from data from INE, National Household Survey (*Encuesta Continua de Hogares*, ECH), 2008

Economic Indicators

<p style="text-align:center">Table 1.
Economic indicators, 2005–2012</p>

	2005	2006	2007	2008	2009	2010	2011	2012
GDP (current prices, US$ billion)	17,363	19,579	23,410	30,366	30,229	38,846	46,435	49,059
GDP (current prices, US$), per head	5,222	5,879	7,013	9,068	9,996	11,520	13,724	14,449
Gross National Income (GNI), (current US$), per head	9,350	10,100	11,050	11,970	12,240	13,410	14,600	15,570
Unemployment (% of total labor force)	12.2	10.6	9.2	7.6	7.3	6.8	6.0	6.5
Inflation (average annual rate, % against previous year)	4.8	6.3	8.5	9.2	5.9	6.9	8.6	7.4

Sources: World Bank, August 2013; INE, National Household Survey; Consumer Price Index (*Indice de Precios al Consumidor*, IPC), 2013

1. Media Consumption: The Digital Factor

1.1   Digital Take-up

1.1.1   Digital Equipment

Uruguayans have moved from the consumption of traditional media (television, radio, and the press) to an increasingly intense consumption of digital media. According to a 2009 report on cultural consumption,[9] the first decade of this millennium proved "more technological, diverse and interactive" in terms of the transition to digital media, which was the result of the growing reach of the internet as a result of government programs to achieve "digital equity,"[10] such as the CEIBAL Project,[11] as well as of the high penetration of mobile telephony.

The CEIBAL Project is a state-supported program authorized by a presidential decree-law of December 2006, implemented by the Ministry of Education and Culture (*Ministerio de Educación y Cultura*, MEC), the National Telecommunications Administration (*Administración Nacional de Telecomunicaciones*, ANTEL), the National Public Education Council (*Administración Nacional de Educación Pública*, ANEP), and the Technological Laboratory of Uruguay (*Laboratorio Tecnológido del Uruguay*, LATU). Through this project, all students and teachers in public schools were to be given a personal computer (PC). By 2011, a total of 455,970 computers had been provided, of which 325,651 went to elementary schools and 99,497 to high schools.[12] One year after, by 2012, a total of 566,000 computers had been provided.[13]

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9.   S. Dominzain, S. Rapettis, and R. Radakovich, "Imaginarios y consumo cultural 2009" (Imaginary and cultural consumption 2009), MEC-UNESCO-CCE-UDELAR, Montevideo, 2010, at http://www.mec.gub.uy/innovaportal/file/5545/1/imaginarios_y_consumo_cultural_2009.pdf (accessed 9 September 2013) (hereafter, Dominzain *et al.*, "Imaginarios y consumo cultural 2009").

10. "Digital equity" is defined as equal access to and use of the media and information technologies for the whole population.

11. A state program for technological equality that aims to provide each school student and teacher at public schools with a laptop PC.

12. For further information on the CEIBAL Project, see www.ceibal.org.uy and www.ceibal.edu.uy (accessed 20 May 2013).

13. See http://www.ceibal.edu.uy/Articulos/Paginas/ceibalometro-2012.aspx (accessed 21 May 2013).

The number of households with at least one PC rose significantly between 2004 and 2012, reaching 63.7 percent of the population, though urban areas are better covered. Access to radio and television is practically universal, with over 90 percent of the population and households having access to such a device.

Table 2.

Households owning equipment, 2005–2012

	2005*		2006		2007		2008		2009		2010		2011		2012	
	No. of HH[14] ('000)	% of THH[15]	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	No. of HH ('000)	% of THH
TV set	720	92.4	939	91.0	945	91.6	966	93.4	1,006	94.4	1,122	95.2	1,139	96.1	1,099	97.0
Radio set	n/a	n/a	975	94.3	973	94.3	975	94.2	987	92.9	1,089	92.4	1,085	91.5	1.030	90.9
PC	172	22.1	252	24.4	291	28.2	366	35.3	505	47.6	630	53.4	711	60.0	722	63.7

Notes: * Includes only locations with over 5,000 inhabitants; n/a: not available

Source: Based on data from INE, National Household Surveys, 2005–2012

1.1.2   Platforms

Access to free-to-air television is practically universal, since over 90 percent of the population consumes television in this way. Pay-TV (cable) also reached almost half of the population in 2009. There is a provider of digital television services via satellite (DirecTV), which reached some 5 percent of the market between 2008 and 2010.

Mention should be made of the extensive areas that lack access to free-to-air television, particularly along international borders and in remote locations where free-to-air television is delivered through cable.

The history of digital reception is quite recent. DirecTV started operating in Uruguay in 2001,[16] but migration from analog television to terrestrial digital television began in 2010 and will continue until November 2015, the time set by the government for analog switch-off.[17] The country adopted the ISDB-T technical standard for digital terrestrial television (DTT) in 2010, followed in June 2011 by the first wave of digital licensing for experimental broadcasting, and in May 2012 by the adoption of the regulatory framework for terrestrial digital television (Decree-Law 152/2012). This framework divided the spectrum for free-to-air television services into three segments: seven licenses were reserved for commercial television, seven for community services, and six for public services. Following the launch of a public information campaign in August 2012, applications for licenses were invited in December 2012 with the aim of launching commercial television programs in January 2013. However, the licensing process was halted by a presidential Decree-Law of 23

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14.   Total number of households owning the equipment.

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

16.   See http://archivo.presidencia.gub.uy/noticias/archivo/2001/agosto/2001082818.htm (accessed 27 May 2013).

17.   See http://www.itu.int/ITU-D/tech/events/2012/Broadcasting_URSEC_Montevideo_June12/Presentations/Broadcasting_URSEC_Montevideo_June12_Presentation11.pdf (accessed 10 April 2013).

January 2013.[18] At the same time, incumbent private operators received automatically digital licenses last year (see section *5.1* for a detailed discussion of the latest developments).

Table 3.

Platforms for the main television reception and digital take-up, 2005–2012

	2005		2006		2007		2008		2009		2010		2011		2012	
	HH ('000)	% of TVHH	HH ('000)	% of TVHH	HH ('000)	% of TVHH	HH ('000)	% of TVHH	HH ('000)	% of TVHH	HH ('000)	% of TVHH	HH ('000)	% of TVHH	HH ('000)	% of TVHH
Terrestrial reception	399	55.5	519	55.3	504	53.4	484	50.1	499	49.8	503	45.0	471	41.4	411	37.4
– of which digital	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Cable reception	319	44.5	419	44.7	440	46.6	482	49.9	502	50.2	615	55.0	352	31.0	348	31.7
– of which digital	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	31.5	27.7	339	30.9
Satellite reception	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
– of which digital	n/a	n/a	n/a	n/a	n/a	n/a	14	4	n/a	4	n/a	7	52	10	81	14
Total	718	100	938	100	944	100	966	100	1001	100	1118	100	823	100	759	100

Note: n/a: not available; satellite reception is digital-only

Sources: Reception of free TV and terrestrial pay-TV: INE, National Household Surveys, 2005–2012; pay-TV by satellite (DirecTV): Communications Services Regulatory Unit (*Unidad Reguladora de Servicios en Telecomunicaciones*, URSEC)[19]

Internet users at national level amounted to over half of the population (55.1 percent) by 2012.[20] More than two-thirds of households with an internet connection in 2012 had broadband. The growth in mobile telephony is also explosive. Between 2005 and 2012, mobile penetration more than quadrupled to 147.3 percent.

Table 4.

Internet penetration and mobile penetration, 2005–2012

	2005	2006	2007	2008	2009	2010	2011	2012
Internet*	5.2	5.9	6.9	8.0	8.9	10.9	13.4	16.6
– of which broadband**	26.0	47.0	62.0	65.0	71.0	66.0	n/a	68
Mobile telephony	34.7	69.9	89.9	104.7	122.3	132.1	140.8	147.3
– of which 3G	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Note: * Fixed internet subscriptions as percentage of inhabitants; ** as percentage of total internet users; n/a: not available

Sources: ITU for internet;[21] Radar Study Group, 2006–2010 Survey, "El perfil del internauta uruguayo" (Profile of the Uruguayan Internaut) for broadband internet;[22] ITU for mobile,[23] except 2001, which is from URSEC

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18. Decree-Law of 23 January 2013, at http://www.dinatel.gub.uy/documents/49884/0/Decreto%202013-%20028?version=1.0&t=135965336 1000 (accessed 27 May 2013).

19. See http://www.ursec.gub.uy/scripts/templates/portada.asp?nota=Contenidos/Info%20Mercados/Telecomunicaciones (accessed 10 February 2013).

20. ITU, at http://www.itu.int/ITU-D/ict/statistics (accessed 15 August 2013).

21. See http://www.itu.int/ITU-D/ict/statistics (accessed 15 August 2013).

22. See http://www.gruporadar.com.uy (accessed 15 August 2013).

23. See http://www.itu.int/ITU-D/ict/statistics (accessed 15 August 2013).

1.2   Media Preferences

1.2.1   Main Shifts in News Consumption

Although most consumption is geared to traditional mass media, the presence of the internet has increased a great deal. According to a 2009 study of media consumption,[24] virtually the whole population (96 percent) watches television on a daily basis, a proportion which had not changed during the previous decade. Almost half of these viewers (45 percent) watched on average of between three and five hours of television a day in 2009. The number of daily radio listeners, who in 2009 represented 74 percent of all Uruguayans, has diminished steadily since 2000, with 10 percent of regular listeners lost. This decrease mainly affected AM radios, which were listened to by almost 39 percent of Uruguayans in 2009, and consequently the journalist production and radio newscasts on these stations, while FM stations basically focus on music.

The growth of the internet in recent years has led to a massive consumption online, particularly by youth who were directly targeted by the CEIBAL Project. By 2009, 44.7 percent of people aged 16–29 used the internet on a daily basis or almost daily. According to CEIBAL's Monitoring and Assessment Department, 68 percent of the beneficiaries of PC distribution through the project in 2012 came from the bottom 10 percent of salary earners.[25]

Newspaper circulations have varied slightly throughout the decade. By 2009, regular readers (reading at least once a week) consisted of almost 39 percent of the population, which was a decline of 4 percent compared with 2002.[26] Studies by the Radar Study Group market research company have confirmed the growing trend of news consumption on digital media during 2006–2012 (see Figure 4). The proportion of internet users who accessed some kind of news media online in 2012 was close to 39 percent of the total, with some differences between the capital Montevideo (43 percent) and the rest of the country (35 percent).

In December 2011, the weekly exposure to digital content in Montevideo exceeded the exposure to exclusively print media readers. In other words, in December 2011, some 49 percent of Uruguayans in Montevideo had the experience of consuming news on digital platforms, while only 32 percent of them were solely readers of print media. Although a direct cause has not been established, available research indicates that the increase in digital (i.e. online) press readers since 2008 could be related to the continued fall in print press consumption.

At the same time, the digital consumption of news content is more frugal than in print media. Although the number of readers of digital content quadrupled in less than three years, the average time readers spend

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24.   Dominzain *et al.*, "Imaginarios y consumo cultural 2009," p. 19.

25.   CEIBAL, "Evolucion de la brecha de acceso a TIC en Uruguay (2008–2012)" (Evolution of the ICT Access Gap in Uruguay (2008–2012)), May 2013, p. 16, at http://www.ceibal.org.uy/docs/Evolucion-de-la-brecha-de-acceso-a-TIC-y-contribucion-del-Plan-Ceibal-2012.pdf (accessed 24 October 2013).

26.   Dominzain *et al.*, "Imaginarios y consumo cultural 2009."

consuming news online is much lower than in the print press. In May 2010, the average reading time for the printed press was 54 minutes per week, while the average for online editions of the press was 37 minutes.[27]

Data Media showed in 2011 that only 10.5 percent of the inhabitants of Montevideo matched the description of a "perfect press reader," that is, someone who regularly reads newspapers in print as well as via digital portals.

Figure 4.

Internet users who accessed news on the internet, by geographical area (% of total users), 2006–2012
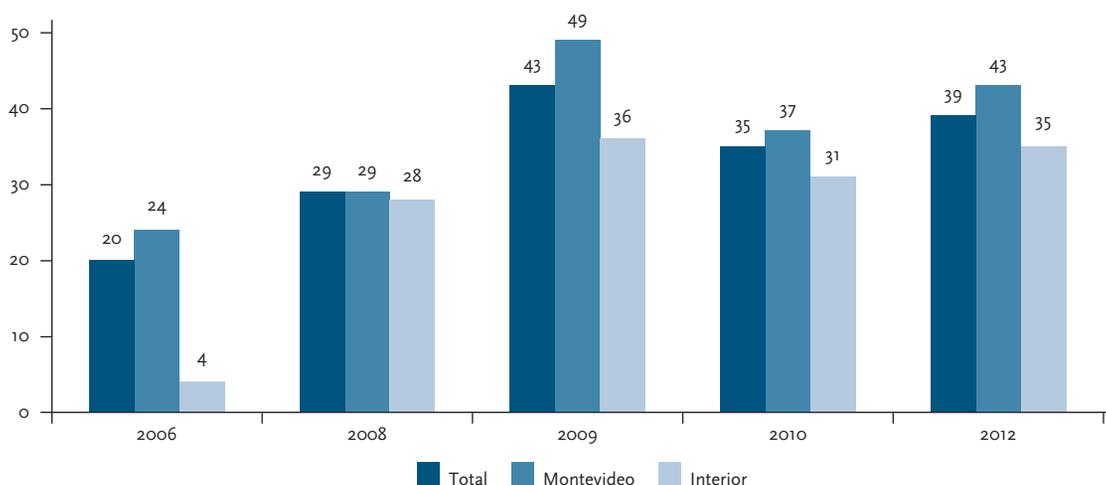
Note: No data available for 2007 and 2011

Source: Based on 2006–2010 surveys, Perfil del Internauta Uruguayo (Profile of Uruguayan Internauts), Grupo RADAR[28]

1.2.2   Availability of a Diverse Range of News Sources

The migration of readers from paper to digital has been significant, but in practice this has not increased news diversity, as internet users mostly access content that was originally available in print. The sole exceptions are 180.com and Montevideo.com, two news portals that exist exclusively online.

There is a variety of news and journalism programs on radio, particularly on AM stations. Most such programs and hosts have achieved continuity for years and attract a loyal public. As a result, radio programming has not undergone major variations during the past five years.

The structure of the television sector has remained more or less unchanged since the beginning of free television in the 1940s. The free-to-air television channels are three private channels (Channel 12 La Tele, Channel 10 Saeta, and Channel 4 Montecarlo TV) and the state-managed public television station Channel 5 (*Televisión Nacional Uruguaya*, TNU). Private channels have increased the number of daily newscasts in recent years, reaching a total of four newscasts a day (morning, noon, primetime at 7 p.m., and late night). News programs on private television channels achieve the highest audience levels among all programs.

27.   Data Media Report, at http://www.subrayado.com.uy/Resources/Uploads/RelatedFiles/Docs/Lectoria.pdf (accessed 15 February 2012).

28.   See http://www.gruporadar.com.uy/01/?p=830 (accessed 28 February 2013).

1.3   News Providers

1.3.1   Leading Sources of News

1.3.1.1 Television

Television constitutes the principal news medium for consumers. The leading position among the various stations has shifted from one channel to another, alternating between the three private channels, but without defining a natural leader in the period 2003–2013. Still, between 2007 and 2013, Channel 12 maintained an important lead compared with the other channels. Among private broadcasters, Channel 10 has had the lowest share. The public channel, on the other hand, has historically shown a much lower level of audience compared with the private channels.

Figure 5.
Yearly average ratings of free-to-air television stations, 2003–2010
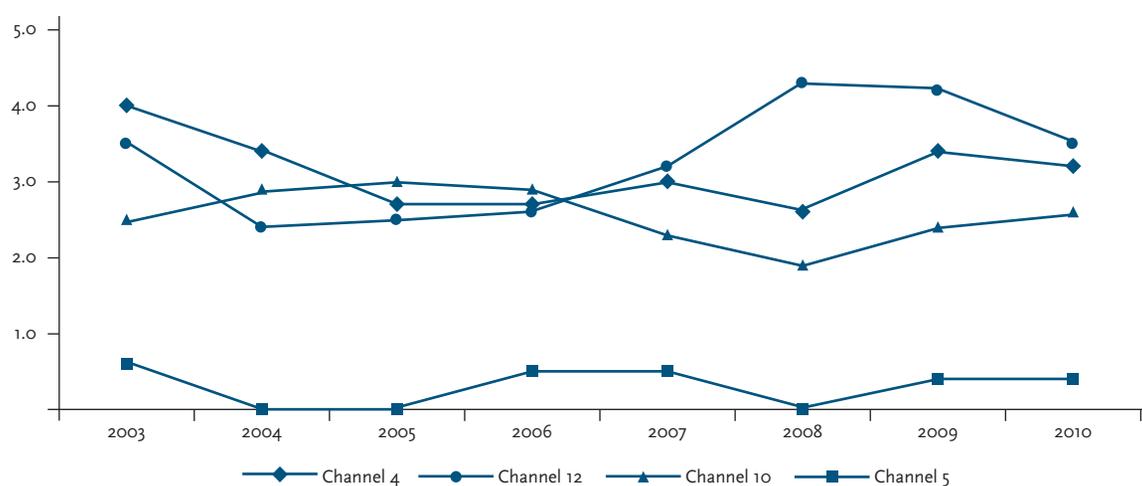
Note: "Rating" is defined as the percentage of television viewers exposed to a specific program. One percentage point of national rating is equivalent to 29,468 persons, according to Equipos Mori, 2010

Source: Equipos Mori, National Audience Measurements, 2010[29]

1.3.1.2 Radio

Roughly three-quarters of the population still listens to the radio. There was a decline in regular audiences by 10 percent between 2002 and 2009. FM radio, which specializes in music, dominates the sector, while AM radio, which airs more news and current affairs content, has much lower ratings.[30] Equipos Mori found that most radio listeners, of both FM and AM stations, listen to radio programs around noon every day. The audience is less affluent in the afternoon hours for both FM and AM stations.

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29.   See http://www.equipos.com.uy/noticia/servicio-medicion-nacional-de-audiencias (accessed 30 November 2012).

30.   Dominzain *et al.*, "Imaginarios y consumo cultural 2009."

The AM radio segment is dominated by the radio station CX20 Montecarlo, which has maintained through the years an average audience share of 10 percent among AM radio stations, well above other radio stations in the AM sector, according to the Uruguay Marketing Institute (*Instituto de Marketing del Uruguay*, IMUR).[31] The data refer to the Montevideo area. The most typical content on CX20 Montecarlo consists of newscasts and journalistic, sports, and music programs. The program is peppered with news bulletins every 30 minutes. The station achieves high ratings particularly with news programs such as "*Informativo 930*" that reach up to 20 percent of the country's listeners with its noon program.

In a distant second place, the radio station El Espectador has managed to defend an average audience share during the past five years of over 3.5 percent. Its programming also shows higher audiences at noon with the newscast "*Índice 810*."[32]

Some other news programs with good audiences, although much further down the ratings than the leader CX20 Montecarlo, include "*Informativo Sarandí*" on CX8 Sarandí aired at noon and "*Primera voz*" on CX44 AM Libre, a news and reportage program aired from 8 a.m. until 10 a.m.

Table 5.

Average daily audience share of AM radio stations in Montevideo (% of total audience), 2007–2012

Radio channel	Sept. 2007	Sept. 2008	Sept. 2009	Sept. 2010	Aug. 2011	Oct. 2012
CX36 Centenario	2.5	1.0	1.9	3.1	1.2	0.9
CX12 Oriental	1.5	1.8	2.1	1.7	1.3	1.7
CX22 Universal	2.1	2.2	1.0	1.1	1.4	1.5
CX4 Rural	1.0	2.1	0.8	1.3	1.8	1.8
CX44 AM Libre	0.8	1.1	1.6	1.6	2.0	2.3
CX18 Sport 890	3.0	2.3	2.9	2.7	2.6	2.4
CX58 Clarin	2.4	3.3	2.2	2.0	2.7	2.4
CX8 Sarandi	1.5	1.4	2.3	2.4	3.3	3.5
CX14 El Espectador	3.5	2.9	4.2	3.5	3.4	3.0
CX20 Montecarlo	11.6	12.0	11.8	9.5	9.2	10.6

Note: The audience share is defined by Equipos Mori (2010) as the percentage of listeners in the total effective audience, which means total connected radio sets[33]

Source: Uruguay Marketing Institute (*Instituto de marketing del Uruguay*, IMUR), "Radios Bureau" Report, August 2011 (data refer to Montevideo and the metropolitan area)

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31. Defined as the portion of audience corresponding to each medium over the total effective audience considered (in a week, day or hour). It is calculated based on the total sets connected in the case of TV or radio, and on the total number of readers in the case of the printed press. Definition taken from Equipos Mori, "Noticias de Medios (NOTIMED)" Report, 2010, at www.equipos.com.uy (accessed 20 July 2012) or http://comunicacionpublicitaria.com.uy/category/marketing/audiencia (accessed 20 July 2012)

32. The signal reaches more audience than "CX20 Montecarlo" at midnight, when the Argentinian entertainment program "*La venganza será terrible*" is aired, capturing some 16 percent of all AM listeners.

33. "Noticias de Medios (NOTIMED)" Report, at www.equipos.com.uy or http://comunicacionpublicitaria.com.uy/category/marketing/audiencia (accessed 20 January 2013).

The leading station in the FM segment is Aire FM, whose peak audience share has ranged between 7 percent and 9 percent in recent years, followed by Galaxia and La Ley with top audience shares of 4–5 percent for the same period. Most of the FM radio stations are geared to music content. Other FM radios with high audiences are Océano FM, Metrópolis, and Radiocero. All three offer mostly a combination of music programs and journalistic and entertainment casts. Metrópolis is particularly successful, with the television news program of Channel 12 broadcast simultaneously on radio and television.

Table 6.

Average daily audience share of FM radio stations in Montevideo (% of total audience), 2007–2012

Radio channel	Sept. 2007	Sept. 2008	Sept. 2009	Sept. 2010	Aug. 2011	Oct. 2012
95.5 Del Plata	0.7	1.0	3.5	2.7	3.3	3.2
105.9 Galaxia	5.0	4.8	4.5	4.7	3.6	3.7
104.9 Metrópolis	4.4	4.3	3.6	4.7	3.8	4.0
90.3 Oldies	3.6	4.2	3.5	3.4	4.0	3.4
104.3 Radiocero	3.4	3.7	2.9	3.0	4.1	2.8
106.7 La Ley	5.2	2.4	3.1	4.6	4.5	3.9
103.7 Latina	0.8	2.0	2.0	2.1	4.5	4.4
93.9 Oceano	2.8	2.5	4.0	4.4	5.2	4.2
91.9 Disney	3.4	3.4	4.0	4.2	5.6	6.5
100.3 Aire	7.7	12.0	7.8	9.6	7.4	7.0

Note: The audience share is defined by Equipos Mori (2010) as the percentage of listeners in the total effective audience, meaning total connected radio sets[34]

Source: Uruguay Marketing Institute (*Instituto de marketing del Uruguay*, IMUR), "Radios Bureau" Report, August 2011 (data refer to Montevideo and the metropolitan area)

1.3.1.3 Print Media

According to a 2010 study on media consumption, some 38 percent of the population read a newspaper at least once a week. Middle-aged adults (30–59 years of age) with better educations from households with a monthly income over UYU 21,670 (US$ 1,000) are more frequent readers of newspapers.[35]

The newspaper *El País* has proven to be the absolute leader in readership in the past seven years, with a 4 percent rating for its printed version.[36] *El País* was founded in 1918 by a leader of the National Party. It was the first newspaper in Latin America to have a full-color front page. At present, it includes varied information and regular supplements: one of the most popular is *Gallito Luis*, a classifieds guide comprising mainly job and property advertisements.

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34. "'Noticias de Medios (NOTIMED)" Report, at www.equipos.com.uy or http://comunicacionpublicitaria.com.uy/category/marketing/audiencia (accessed 20 January 2013).

35. Dominzain *et al.*, "Imaginarios y consumo cultural 2009."

36. "Rating" is defined as the percentage of readers who read a specific newspaper: one percentage point of national rating is equivalent to 29,468 persons, according to Equipos Mori, 2010.

El Observador was founded in 1991 by Ricardo Peirano and is currently owned by a corporation controlled by Uruguayan and foreign capital. According to its director, the newspaper focusses on high-quality editorials and bases its work on the principles of defending democracy, political and economic liberalism, the family institution, life in general, and a fair society.[37] It was the first Uruguayan newspaper with a digital version, launched online in 1995 on its 15th anniversary. At the same time, *El Observador* changed the Saturday edition from a traditional newspaper to a magazine-like format serving up analysis, including in-depth news analysis.[38]

La República was founded in May 1988. This national newspaper with a leftist outlook covers political, economic, and cultural news.[39]

On 4 July 1992, after seven years as a weekly, *La Juventud* became the official outlet of the 26th March (*26 de Marzo*) political movement. It originated in the dictatorship period, with a radical leftist editorial agenda. It has a small circulation (approx. 500 issues), including two Sunday supplements: *Mundo Entrelíneas*, focussed on foreign coverage, and *Debates*, covering socialist events and promoting leftist perspectives.[40]

First published on 20 March 2006, *La Diaria* boasts editorial independence and a low cover price of UYU 20 (US$ 0.90), compared with the average of UYU 30 (US$ 1.40) charged by most competitors. Not aligned with any party, the newspaper's editorial line may be described as critical and progressive.[41]

Table 7.
Yearly average ratings for newspapers, 2003–2010

Newspaper	2003	2004	2005	2006	2007	2008	2009	2010
El País	5.7	4.6	3.7	3.9	2.8	2.8	3.1	4.0
El Observador	1.0	0.9	0.7	0.5	0.5	0.4	0.4	0.5
La República	1.6	1.5	1.1	1.9	1.2	0.9	1.1	1.1
La Juventud	0	0	0	0	0	0	0.1	0
La Diaria				0	0.1	0.3	0.1	0.4	1.0
Últimas Noticias	0.3	0.3	0.3	0.2	0	0.1	0.1	0.1

Note: "Rating" is defined as the percentage of readers who read a specific newspaper. One percentage point of national rating is equivalent to 29,468 persons, according to Equipos Mori, 2010

Source: Equipos Mori, National Audience Measurements, 2010

37. See http://www.infouruguay.com.uy/PRENSA-ESCRITA-URUGUAY.htm (accessed 30 November 2012).

38. See http://www.infouruguay.com.uy/PRENSA-ESCRITA-URUGUAY.htm (accessed 30 November 2012).

39. See http://www.lr21.com.uy (accessed 10 December 2012).

40. See http://es.wikipedia.org/wiki/Diario_La_Juventud (accessed 10 February 2013).

41. See http://www.ort.edu.uy/facs/pdf/Casos47.pdf (accessed 21 May 2013).

1.3.1.4 Online

The newspaper *El País* is the main media outlet accessed on the web by Uruguayans, followed by Montevideo.com, *El Observador*, *La República*, and *El Espectador*. The information on the *El País* and *El Observador* websites is continuously updated, but on the *La República* website news is refreshed only once a day. El País Digital offers its readers general information, both local and international, but also columns, lifestyle stories, and business articles. Launched in 1991, Montevideo.com is the only private internet service provider in Uruguay that offers internet and intranet corporate services and solutions. The portal publishes political, economic, sports, cultural, technology, and general news from Uruguay and the world.[42] It also includes interactive sections for user participation.

El Observador's portal was the first online edition of a newspaper in Uruguay. It appeared in 1995 as El Observador Global and in 2000 it changed its name to Observa (Observa.com.uy) and started providing news services that are continuously updated. Observa provides local and international news as well as economic, agricultural, sports, entertainment, style, technology, and health news, in addition to readers' columns and a classified-ad section for cars and houses. It also includes interactive spaces and videos, and different publications and blogs.[43]

Figure 6.

Most popular digital news sites accessed by internet users (% of total), 2009, 2010, 2012
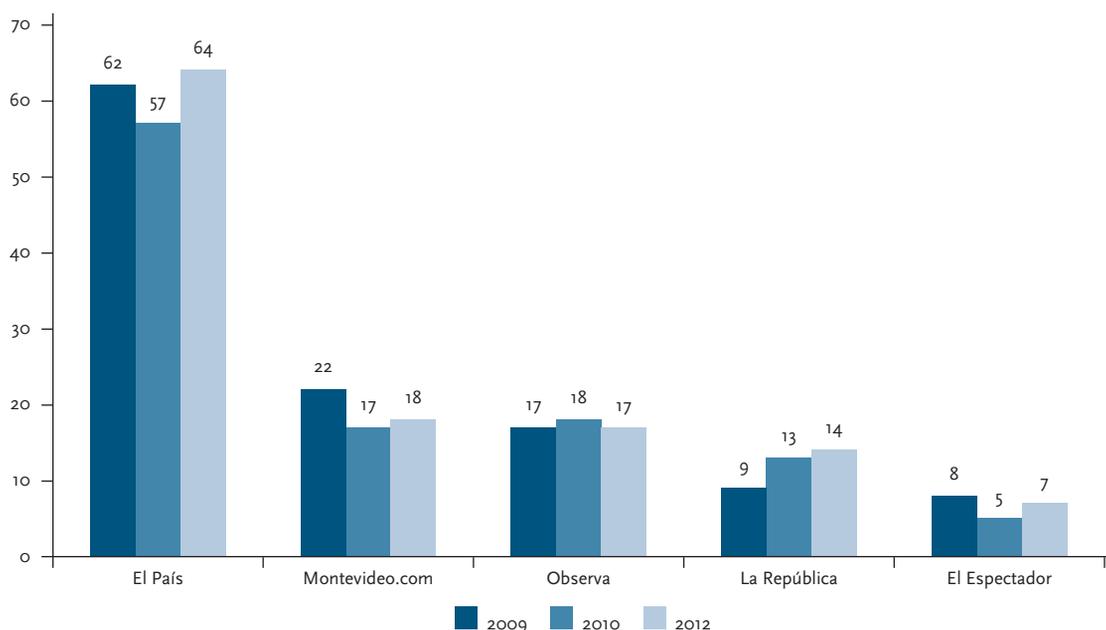
Note: No data are available for 2011

Source: Radar Study Group, "El perfil del internauta Uruguayo" (Profile of the Uruguayan Internaut), 2009, 2010, and 2012

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42. See http://www.montevideo.com.uy/notutiles_156602_1.html (accessed 10 February 2013).

43. Daniel Álvarez Ferretjans, *Historia de la Prensa en el Uruguay*, Fin de Siglo-Búsqueda, Montevideo, 2008, p. 643.

LaRed21 (Lr21.com.uy), *La República*'s news portal, is refreshed once a day and provides the latest news on the community, politics, the economy, sports, international issues, culture, health, science, ecology, interviews, videos, and a section devoted to highly complex social and political debates under the name Enredad@s.

El Espectador (Elespectador.com) offers local and international news, economy, sports, culture, and entertainment sections, a lifestyle section, and a technology rubric, as well as readers' blogs.

1.3.2 Television News Programs

The number of daily newscasts on television has risen. All major private channels air four news programs daily and the public channel offers two newscasts a day. In 2009, free-to-air television channels aired an average of three hours of news daily, according to the Brazilian Institute of Public Opinion and Statistics (*Instituto Brasileño de Opinión Pública y Estadística*, IBOPE).[44]

Esteban Perroni of Data Media said that the same news pieces are repeated several times a day to make sure viewers who often consume news programs on more stations are reached.[45] The television hosts of the news programs on Channel 12 and Channel 4, Aldo Silva and Fernando Vilar, said that they experienced a massive public appetite for news. Mr Vilar said: "I thought that a half-hour news program was enough. However, newscasts take a whole hour, or even an hour and a half or two hours, and viewers continue to watch."[46]

The largest audience is concentrated on the 7 p.m. newscasts, according to 2013 data from Equipos Mori, a situation that has not changed since 2006.[47]

In 2006 and 2009, the news program with the highest rating in the country during primetime (between 7 p.m. and 9 p.m.) was "*Telenoche,*" the evening newscast on the free-to-air commercial Channel 4 with national coverage, which scored at its best ratings of 21.6 percent. "*Telenoche*" offers a rather sensationalist array of reports from journalists on the spot, focussing on crime. In May 2013, "*Telemundo*" of Channel 12 occupied first place with a rating of 12.6 percent, while "*Telenoche*" had 11.6 percent.[48] In recent years, another major program from news providers on television has been "*Subrayado*" (Underline), on Channel 10. Overall, there was no absolute, overwhelming leader in the television news market during 2005–2013.

1.3.2 Impact of Digital Media on Good-quality News

Digital media in Uruguay are still emergent, and still replicate the content of the printed press. Very few pure-players have managed to gain significance. The best such examples are Montevideo.com and 180.com.

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44. IBOPE, in M. Becerra and G. Mastrini, "Los dueños de la palabra" (The Owners of the Word), p. 154, at www.ipys.org (accessed 15 October 2012) (hereafter, Becerra and Mastrini, "Los dueños de la palabra").

45. Interview with Esteban Perroni, "El país de los noticieros" (The country of news programs), *El País,* 23 April 2009, p. 26.

46. Interview with Esteban Perroni, "El país de los noticieros" (The country of news programs), *El País,* 23 April 2009, p. 26.

47. See http://comunicacionpublicitaria.com.uy/ranking-10-programas-de-tv-de-marzo-rating-promedio-emision-en (accessed 5 August 2013).

48. See http://comunicacionpublicitaria.com.uy/ranking-10-programas-de-tv-de-marzo-rating-promedio-emision-en (accessed 5 August 2013).

1.4   Assessments

The main digitization development was more related to equipment and access than to content, namely the introduction of new information and communication technologies (ICTs). In terms of access, the CEIBAL Project was a major development, and the main public policy aimed at narrowing the digital divide. At the same time, CEIBAL has enabled youngsters from poorer backgrounds to have access to such technologies. It has also reshaped the role of the schools in spreading ICTs.

Apart from these aspects, media consumption has undergone a transition towards the digital era as increasing numbers of people switched to digital platforms. Nevertheless, news is mainly consumed via television and radio.

The print media available on the internet have been also growing and merging with other digital platforms. However, this has not yet led to notable improvements in news quality or diversity.

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

The state public media system dates back to the creation in 1929 of the Official Service of Broadcast, Radio, Television, and Entertainment (*Servicio Oficial de Difusión, Radiotelevisión y Espectáculos*, SODRE), tasked to produce and broadcast cultural and news programs.[49]

Today, SODRE comprises four radio stations with national coverage: Uruguay 1050 AM, Clásica 650 AM, Babel 97.1 FM, and Emisora del Sur 94.7 FM. Uruguay airs mainly news and journalism, with news material distributed in four main bulletins (morning, noon, evening, and night), in addition to several shorter bulletins during the day. Clásica focuses on classical music. Babel, which has won several prizes, airs blocks of musical programs, mostly jazz, blues, world music, and classical music. Emisora del sur airs mostly Uruguayan popular music and national rock music, with less news and journalism.

All of SODRE's radio stations may be listened to online.[50] Although they all target specific audiences, none boasts high ratings.

In recent years, state-administered radio stations have undergone major changes, including a technical modernization plan, a staff training program, a reorganization of program structure, and a footprint boost through the installation of new transmitters around the country.

In 2002, television Channel 5, known as National Television of Uruguay (*Televisión Nacional del Uruguay*, TNU), a free-to-air television service with national coverage, ceased to belong to SODRE when it became

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49. Law No. 8.557 Creation of the Official Service of Broadcast, Radio, Television, and Entertainment (Ley 8557 de creación del *Servicio Oficial de Difusión, Radiotelevisión y Espectáculos*, SODRE), at http://www.telecomunicaciones.org.uy/web/images/normativa/8557.pdf (accesed 11 June 2012) and http://www.telecomunicaciones.org.uy/web/index.php?option=com_content&task=view&id=52&Itemid=84 (accessed 21 May 2013).

50. See www.sodre.gub.uy / sodre (accessed 12 June 2012).

an independent agency reporting to the Ministry of Education and Culture, with greater autonomy in management and finances.

Channel 5 went on air in 1963 and has always been acknowledged as the country's public television channel. At first, it aired mostly its own productions, which were considered by journalists and the public as high-quality. However, its programming declined in quality as the number of local productions decreased and more productions were commissioned from third parties. Most local programs are outsourced to journalists or private producers without any guidelines. As a consequence, the channel's image suffered a strong setback. Since 2000, however, Channel 5 has undertaken a major transformation, with the result that it is no longer seen by the public as the "gray channel," as was the case in past decades.[51]

In 2005–2007, it set out to establish itself as the information channel, for which purpose the news programs were reinforced with specialized staff. Newscasts were aired half an hour earlier than private channels in primetime. Negotiations were started to form agreements with foreign public television stations such as the BBC, and other channels in the region such as Argentina's Channel 7. These cooperations resulted in the import of high-quality fiction programs. Further arrangements as part of refreshing the output included programs of interest to the general public and cultural programs produced locally.[52] This was in addition to a continued focus on journalists' standards.

According to a recent study of television programming in Uruguay,[53] Channel 5 contributes substantially to the diversity of genres in the free-to-air television offer through its recent focus on Uruguayan films, European drama, and arts and culture. Despite these improvements in programming, Channel 5 has yet to improve its disorderly administration and management.[54]

In July 2012, a bill was submitted as part of the national budget proposal that envisaged the creation of the National Audiovisual Communication Services (*Servicio de Comunicación Audiovisual Nacional*, SCAN),[55, 56] comprising the TNU, the SODRE radio stations, and the Film and Audiovisual Institute of Uruguay (*Instituto*

51. R. Radakovich, "Tv pública en Uruguay, entre espejos y espejismos" (Public TV in Uruguay, between mirrors and illusions), in Espacio Abierto, *Revista Venezolana de Sociología* (Venezuelan Sociology Review), 2 Vol. 14, No. 3, July–September 2005, pp. 335–359 (hereafter, Radakovich, "Tv pública en Uruguay").

52. According to Channel 5's programming manager, Carolina Guadalupe, current guidelines in their programming include advancing "towards a clearly cultural, informational, recreational, and entertaining approach through a general image oriented at all audiences. The idea is to create an updated audience with a critical spirit avid for knowledge through quality television. As a result, the programs offered are quite varied in what concerns content genres, both national and international, including base programs, children's contents, fictions, and documentaries, among others" (interview in Montevideo, 21 February 2011).

53. G. Buquet, E. Lanza, and R. Radakovich, *Diversity in Uruguayan Television*, Montevideo, 2013 (hereafter, Buquet *et al.*, *Diversity*).

54. According to *El País*, "Delays in accounting procedures to determine expenses, lacking procedures manuals for checks administered, the absence of a policy regarding barters and omissions relative to staff discipline [at Channel 5] have caused several remarks by the State's central Finance Administration Authorities" (14 April 2010).

55. See http://www.180.com.uy/articulo/27248_Rendicion-de-cuentas-propone-centralizar-medios-publicos (accessed 16 October 2012).

56. See http://www0.parlamento.gub.uy/textosaprobados/AccesoTextoAprobado.asp?Url=/textosaprobados/camara/d20120816-112020-0476.htm (accessed 15 October 2012).

del Cine y Audiovisual del Uruguay, ICAU).[57] The proposal was approved and has been in place since January 2013. The body is in charge of coordinating the design of a national program for audiovisual communications as a preparatory step towards digitization, which is seen as a major advance towards the better organization and management of public media and an opening for fresh state policies for the audiovisual sector.

Also worth noting is the 2008 creation by the Cinema and Audiovisual Act (Law No. 18.284) of ICAU as a decentralized body of the Ministry of Education and Culture.[58] The main purpose of ICAU is to design national policies to promote the production and distribution of audiovisual and cinema works.[59]

Since 1996, there has also been City TV (Tevé Ciudad), a public channel administered by the municipality of the City of Montevideo, distributed by private cable operators. The first local public channel in the country, City TV is the outcome of negotiations with cable operators dating from the time when the municipality was committed to installing a cable network in the city. Instead of paying for the license to install cables, these operators agreed to carry the municipality's own channel, albeit under significant restrictions, including a prohibition on advertising sales. Despite this limitation, the channel has created a new model of public television by focussing on cultural productions. Initially, programming also covered social inequity issues and the poor areas, the city and its traditional spaces and institutions, and human rights.[60] The original programming model has survived, though greater significance is now placed on studio productions of journalistic and news programs.

Another interesting participatory television project with a public service mission, called Tree (Árbol), was started within City TV in 2003.[61] It aims to promote self-expression by communities through audiovisual works[62] "in a move to support social inclusion and local development."[63] In 2003, Tree invited four social organizations representing different districts of Montevideo to film a video that would be played in their communities and broadcast by the channel. By 2011, over 100 groups had signed up. In total, over 150 audiovisual works have been produced, and training in audiovisual production was given as part of the process to approximately 1,300 people.[64] The project became the Árbol Group (*Colectivo Árbol*) in 2009, and later that year parted from City TV to operate at national level as Árbol Community Television through a number of different channels offering airtime.

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57. Unfortunately, the inclusion of ICAU in the SCAN has not yet been regulated, and the bill for the Law on Audiovisual Communication Services (LSCA) excludes ICAU from the SCAN. See http://sitio.amarcuruguay.org/wp-content/uploads/2013/06/cons_min_682_anexo.pdf. p. 100 (accessed 1 November 2013).

58. ICAU succeeded the National Audiovisual Institute, established in 1994 as part of the Ministry of Education and Culture.

59. R. Radakovich, G. Lescano, *et al.*, *Industrias creativas innovadoras: el cine nacional de la década* (Innovative and creative industries: national cinema of this decade), Prodic, UDELAR, Final Research Report, Montevideo, 2012, p. 178 (in publication).

60. R. Radakovich, *Territorios televisivos* (Television Territories), Cal y Canto, Montevideo, 2004.

61. Radakovich, "Tv pública en Uruguay."

62. See www.arbol.org.uy (accessed 12 July 2012).

63. Árbol Group, "Uruguay: Arbol televisión participativa. Haciendo televisión para convivir" (Uruguay: Participative television. Working in television for sharing life), in Hermida M. Martinez, C. Mayugo, and A. Tamarit, *Community and Communication. Communication practices and community media in Europe and Latin America*, Fragua Publishers, Biblioteca Ciencias de la Comunicación Collection, Madrid, 2012, pp. 131–144 (hereafter, Árbol Group, "Uruguay: Arbol televisión participativa").

64. Árbol Group, "Uruguay: Arbol televisión participative."

Since 2001, City TV has had four different directors with their own visions reflected in the channel's programming. While the number of in-house productions, including journalistic programs, has increased, the station has often been criticized for not producing high-quality programs.[65]

City TV is bound by its agreement with cable operators to limit its programs to local news and information. As a result, its main daily newscast was scrapped in January 2011. Instead, the channel offers programs such as "*Ciudad +*" (City +), a daily current affairs analysis of social and cultural topics; "*Montevideo al día*" (Montevideo Today), a weekly program about local events; and "*Primera ronda*" (First Round), a weekly program of political interviews. Martín Papich, director of City TV, argues that "the channel understands information as cross-cutting content in its overall output."[66]

The state-administered Channel 5 has had a much lower audience share than private channels since 2003. In 2010, Channel 5 scarcely managed 0.4 percent.

There are no audience data for City TV. In 2010, according to Data Media, 133,100 Uruguayans were aware that this channel existed, which was less than 10 percent of the city's population and less than 5 percent of all Uruguayans. Nevertheless, among pay-TV channels, City TV ranked second after VTV, a fact which was known by 427,900 citizens.

The public channels lack political independence, for reasons that differ in each case. The directors of Channel 5, which is wholly funded through commercials, are appointed by the government. As a result, they are changed or resign when the central government changes, making it difficult for any management to follow a long-term communications and programming strategy or build a solid image for the channel.

The director's job at City TV was vacant in 2012 until the beginning of November when Martin Papich, a former director of ICAU, was appointed. The period without a director at Channel 5 was characterized by a bitter conflict between the municipal authorities and the channel's employees, who demanded clear criteria for selecting the channel's director, specific principles for program production, and comprehensive objectives for the channel as a whole.

Despite the political influence, none of the state-administered channels suffered political pressures on their editorial lines or in programming. The news programs in particular continue to be independent from the government authorities, but this owes more to the channels' low profiles and importance than to any mechanisms to guarantee editorial independence.

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65. See María Urruzola. "Teve Ciudad," 7 June 2012, paper presented at the Debate Forum on City TV, Uruguayan Press Association (*Asociación de la Prensa Uruguaya*, APU), 20 August 2012.

66. Interview with Martín Papich, director of City TV, Montevideo, 9 October 2013.

In recent years, Uruguay has experimented with important initiatives to change the whole media system, including public media. During 2010, the Technical Consulting Committee (*Comité Técnico Consultivo*, TCC),[67] which was created by the National Telecommunications Office (*Dirección Nacional de Telecomunicaciones*, DINATEL), drafted a proposal for an Audiovisual Communication Services Law. Three years later, on 21 May 2013, the bill on Audiovisual Communication Services was published on the website of the president's office and sent for approval by the legislature.[68] At this time of writing, the bill is still being considered in Parliament.

Significant issues addressed in the bill include the transparency of media ownership, limitations on the ownership of audiovisual communication services to restrict oligopolies and monopolies, limitations on cable television companies in terms of market share (setting a maximum of 25 percent), limitations on the ownership of both audiovisual media and telecommunications companies, limitations on programming, restrictions on the types of programming and advertising in children's and adolescents' special protection periods, the rights of access to audiovisual content by differently disabled people, access to general interest media events—including football and basketball final games—and the promotion of national production and co-production, with a minimum quota of 60 percent of such programming in public and private channels.

In institutional terms, the bill creates an Audiovisual Communication Council (*Consejo de Comunicación Audiovisual*, CCA)[69] together with an Honorary Consulting Commission on Audiovisual Communication Services (*Comisión Honoraria Asesora de Servicios de Comunicación Audiovisual*, CHASCA), with 14 members, and independent of the CCA. In addition, the bill establishes an ombudsman.

Regarding public media, the bill proposes the creation of a Uruguayan National Public System for Radio and Television, managed by three people chosen by the president. The aim would be to reinforce public radio and television, and generate programming strategies to support pluralism and the public interest.

2.1.2 Digitization and Services

The Digital TV Decree-Law of 11 May 2012 stated in Article 2 that six channels would be reserved to the metropolitan area of Montevideo for public television, one to be assigned to TNU, another to "the municipality of Montevideo," and a third to the development of regional television.[70] The other three channels are represented by the analog operations of the three channels mentioned above. Frequencies for three further channels were also reserved for providers of public television services. To date, one has been assigned to TNU to allow it to reach a national footprint, and a second is planned to be used for developing regional public stations.

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67. The TCC was integrated by different civil society institutions, academic experts, and broadcasters.

68. See http://archivo.presidencia.gub.uy/sci/proyectos/2013/05/cons_min_682_anexo.pdf (accessed 21 May 2013).

69. The CCA was initially planned with five members, and to report to the president. It was extremely controversial. Currently, Carlos Varela, a Deputy working on the LSCA bill, stated that the CCA will not ultimately report to the president, it will answer to Parliament. See http://www.infoycom.org.uy/2013/10/aprobacion-en-el-parlamento-de-la-ley-de-medios-quedaria-para-el-proximo-ano, and http://www.infoycom.org.uy/2013/09/ultima-tanda-el-pulido-del-proyecto-de-la-ley-de-medios (28 October, 2013).

70. See http://archivo.presidencia.gub.uy/sci/decretos/2012/05/miem_585.pdf (accessed 12 July 2013).

Finally, TNU was approved on 23 October 2013 as a national public digital television channel, along with 12 regional public digital television channels—so-called "proximity channels"—in municipal areas across the country (Artigas, Cerro Largo, Colonia, Durazno, Florida, Paysandú, Río Negro, Rivera, Salto, San José, Soriano, and Tacuarembó).[71]

Additionally, both public stations, TNU and City TV, stream their programming via Adinet.tv, which belongs to the national telecommunications watchdog, ANTEL.[72] No public stations have yet created any specific content for the internet. Their sites offer basic information about channels such as history, programming schedules, and the like. In the case of TNU, the website includes a selection of clips.

2.1.3 Government Support

Digitization is leading to the strengthening and broadening of public television. Both the Digital TV Decree-Law and the restructuring of the national public media that are part of the National Audiovisual Communication Services shape a new path for the state's media.

The digitization of public television has so far received support, mainly technological, from Japan as part of the implementation of the Japanese-Brazilian digital standard, ISBD-T (see section *5.2.1*). There is no evidence that the adoption of this standard has had any impact on the independence of the state-administered stations.

As part of the commitment to implement the Japanese–Brazilian standards, UYU 85.6 million (US\$4 million) has been invested by the Japanese government in supporting the deployment of digital television in Uruguay, part of which went in the initial stage into the digitization of TNU in Montevideo and its metropolitan area, according to the media expert Gustavo Gómez.[73] The funds will be used essentially to buy new equipment and pay for training in using it. The Japanese government also gave TNU digital equipment to launch pilot transmissions in August 2012.[74] The total Japanese contribution to digitizing TNU amounted to UYU 69.99 million (US\$ 3.26 million).[75]

2.1.4 Public Service Media and Digital Switch-over

The chief gain from digitization for the state-administered stations will be the nationwide footprint and reach, and the opportunity to diversify programming thanks to the automatic allocation by the government of digital frequencies.

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71. For news about TNU and regional public TV in the digital context, see Resolution TNU 663/13, at http://archivo.presidencia.gub.uy/sci/resoluciones/2013/10/miem_979.pdf (accessed 31 October 2013).

72. To access this website, users must register and create an email account at Adinet.com.uy.

73. "Uruguay gozará de Tv digital de calidad japonesa" (Uruguay will enjoy Japanese quality digital TV), *Sétima Revista. Semanario on line*, n.d., Federación Latinoamericana de Trabajadores de la Cultura y de la Comunicación Social (Latin American Federation of Cultural and Social Communication Workers), at http://www.felatraccs.org/portal/index.php?option=com_content&view=article&id=540:uruguay-gozara-de-tv-digital-de-calidad-japonesa&catid=29:radio-y-tv (hereafter, "Uruguay gozará de Tv digital de calidad japonesa") (accessed 10 April 2013).

74. "Uruguay gozará de Tv digital de calidad japonesa."

75. According to data provided by TNU, the Japanese donation to TNU included the main transmitting element, 7.5 KW with antenna, for Montevideo (at US\$ 1,321,897), another core transmitting element, 1 KW with antenna (at US\$ 644,894), and equipment for the broadcasting station (at US\$ 1,268,482).

TNU started the pilot transmission of digital television signal in the metropolitan area of the city of Montevideo in August 2012. The launch of this service was covered by the station and by the media in the country, which has had a significant impact on raising public awareness about the project.

Also, it is significant that City TV will air through free-to-air digital television and on a larger scale, covering the entire metropolitan area of the city.

Another important consideration is the extra numbers of public channels provided for the national territory, a total of six, which would be made possible by digitization, with several located in the provinces (see section *2.1.2*).

These new conditions for public television services will be in place by the analog switch-off scheduled for 21 November 2015. If that happens, these channels will be the guarantee of universal access across the entire country, which is not currently possible because of the location of international borders. Moreover, there will be an increase in the airtime of public television.[76] Hence, public television will have a historic opportunity to extend its presence and diversify its offer, with improved technical conditions.

2.2   Public Service Provision

2.2.1   Perception of Public Service Media

A survey in 2002 by the University Observatory of Cultural Policies[77] revealed that 86 percent of Uruguayans thought that "public channels should exist," with 58 percent considering that these were the only channels where they could watch cultural programs. Some two-thirds of the respondents said these channels should be funded through advertising. There are no more recent public opinion surveys on the state-administered media.

The role of state-administered public channels has been debated in recent years. In a roundtable organized in 2005 by the radio station El Espectador, where several media experts were present, the main question was whether an impoverished country like Uruguay should have a state-owned television channel at all.[78] On 22 and 23 November 2012, the Ministry of Education and Culture organized the Third Meeting of Public Radio Directors in Latin America and the Caribbean, in which a number of experts debated the issues affecting public media in the region. Most of the discussion revolved around the essence of public media— in particular, radio—as vehicles for citizens' access to quality content, and the imperative need to avoid corporate, commercial, and political pressure.[79]

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76. At present there is only one channel with national access, namely TNU, with City TV only allowing access through cable television in the capital city.

77. From the School of Humanities and Education Sciences of the University of the Republic (UDELAR).

78. See http://www.espectador.com/1v4_contenido.php?m=&id=53861&ipag=3 (accessed 1 February 2011).

79. See http://www.radiouruguay.com.uy/innovaportal/file/28272/1/declaracion-encuentro_de_radios_publicas-_montevideo_2012.pdf (accessed 10 May 2013).

Recent years have seen a spate of proposals for reforming the public service media. The governing Broad Front proposed in 2008 that the National Television System (*Sistema Nacional de Televisión*, SNT) and its stations in the provinces should concentrate on programs that focus on arts, sciences, sports, and other forms of culture, and make these programs available to all Uruguayans abroad via satellite television.[80]

On 17 August 2012, the staff of City TV organized a debate at the Uruguayan Press Association (*Asociación de la Prensa Uruguaya*, APU) on the future of public television as part of the transformation imposed by digitization.[81] The debate focussed on the role of a public channel and on whether it should compete for ratings, the social commitment it should assume, and, most of all, on the need for an alternative management model.

Finally, a public opinion survey by DINATEL in 2012 found that 54.55 percent of respondents thought that public channels show—at the least—"good" content.[82]

2.2.2 Public Service Provision in Commercial Media

Basic regulations on content for children such as warnings about programs with highly violent content or explicit sex-related scenes and limits on times when such programs can be shown have traditionally been applied to all television stations.

The Digital Television Act of 2012 introduced new content provisions on both public and private television stations. It obliged private channels to offer free services such as teletext and program guides, give state-administered institutions and other public entities up to 15 minutes daily for public service campaigns on topics such as health, children, and safety, and include in their programming free access to interactive services provided by the state, such as e-government, health, or education.

The act obliges commercial channels to "promote the production of national contents and applications, and the use of local human resources" to provide access for individuals with visual and hearing impairments. The act also requires commercial broadcasters to make yearly contributions proportionate to their gross income from broadcasting, in order to create and maintain a Fund for Audiovisual Production and Digital Television Applications. This last requirement has been heatedly debated among private media organizations, prompting all private television channels, along with the National Association of Broadcasters of Uruguay (*Asociación Nacional de Broadcasters del Uruguay*, ANDEBU), to lodge a complaint against the act. They have expressed their opposition to the definition of deadlines for licenses and permits.[83]

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80. See www.frenteamplio.org.uy/sites/frenteamplio.org.uy/files/files/Programa%202010-2015_1.pdf, p. 111 (accessed 1 February 2011).

81. See http://www.montevideo.gub.uy/noticias/desafios-de-teve-ciudad-en-tiempos-de-transformacion (accessed 16 October 2012).

82. E. Alonso, G. Caetano, and F. Beltramelli, *La ciudadanía y su relación con los servicios televisivos y los cambios tecnológicos* (Citizenship and its relation to television services and technological changes), PRODIC-ICP-MIEMDINATEL, Montevideo, 2013.

83. Daniel Isgleas, "Decreto de TV digital fue impugnado por Andebu" (Digital TV decree-law contested by ANDEBU), Elpaisdigital.com, 9 June 2012, at http://www.elpais.com.uy/120609/pnacio-645416/nacional/decreto-de-tv-digital-fue-impugnado-por-andebu (accessed 17 October 2012).

Detailed in the bill on Audiovisual Communication Services (published on the website of the president's office), the bill introduced quotas for national productions for all channels across the country: 60 percent of total programming on public stations, and 30 percent on private channels. The bill requests that a portion of these productions should be aired in primetime, without specifying exact quotas.[84]

2.3 Assessments

Uruguayan public television has much to gain from digitization. For a long time, the media system has been reduced to a few commercial broadcasters with stagnant programming and static business models, and sometimes has been reluctant to produce good-quality programs of national relevance because of the costs incurred.

Channel 5 benefitted from the entry of a new player in the public broadcasting sphere, City TV, which—by tackling new or unaddressed topics, and innovating in other ways—has forced television stations in general to refresh their programming. For instance, it covers topics such as dictatorship and human rights and has brought out cultural programs targeting local audiences and topics, including popular culture such as carnivals and rock music. This new approach made some private television stations adopt similar changes.

So, while it is too early to assess the impact of digitization on public television in Uruguay, the impact of a single new entrant encourages hope that the appearance of further new players, enabled by digital broadcasting, will bring about positive change.

An outstanding element is the project for the creation of the National Audiovisual Communication Services, as it focusses on reforming the management model of public media and will surely bring profound transformations in the design and implementation of public policies in the audiovisual context.

In the new scenario, the challenge of public television is on one hand to generate its own good-quality content and attractive, innovative, and avant-garde programming, oriented to the general public, in opposition to the commercial model. On the other hand, it should also search for sustainable financing to enable the generation of high-quality content.

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84. At http://archivo.presidencia.gub.uy/sci/proyectos/2013/05/cons_min_682_anexo.pdf (accessed 17 October 2012).

3. Digital Media and Society

3.1 User-Generated Content (UGC)

3.1.1 UGC Overview

Favorite activities online include: searching for information on topics of general interest (82 percent), social networking (78 percent), YouTube (71 percent), chat (70 percent), and email (63 percent).[85] However, only 6 percent of internet users have a blog, and the same percentage of internet users comment on blogs on a regular basis.

In November 2013, according to Alexa, the most visited websites in Uruguay were Google Uruguay, Facebook, Google International, YouTube, MercadoLibre Uruguay, Windows Live, Blogspot, Diario El País, Wikipedia, Yahoo!, Diario El Observador, LinkedIn, and Twitter.[86]

The type of UGC in the most visited websites varies broadly. On MercadoLibre Uruguay, a portal specializing in marketing products, users are allowed to upload all sorts of information and photographs about various products and enquire about various products, as well as review products. Varied content may be found on the website of *El País* newspaper, Elpais.com.uy, and on *El Observador*'s site Observa.com.uy, which includes the greatest amount of multimedia resources and Web 2.0 applications. For example, the Ecos section on Elpais.com.uy allows readers to send contributions on any topics suggested by editors.[87]

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85. Radar Study Group, "El perfil del internauta uruguayo" (Profile of the Uruguayan Internaut), 2013, at http://www.gruporadar.com.uy/01/?p=830 (accessed 3 November 2013).

86. See http://www.alexa.com/topsites/countries/UY (accessed 4 November 2013).

87. Available at http://www.elpais.com.uy/11/02/11/ecos.asp (accessed 18 October 2012).

3.1.2 Social Networks

Table 8.

The most popular social networks and blogs, November 2013

Rank among most visited sites	Social network
2	Facebook
4	YouTube
6	Windows Live
7	Blogspot
12	LinkedIn
13	Twitter
14	Taringa
18	Wordpress
21	Tumblr
54	Badoo

Note: Uruguay is not included in the ranking of countries in Google Ad Planner

Sources: ALEXA national and international rankings; Google Ad Planner International Ranking, November 2013

According to a study by Fernando Salas and Eileen Hudson in 2010, Facebook was the most used social network, with over 714,060 registered users in April of that year. Facebook was considered the "most complete" social network by users aged 18–24, the age group on which the study focussed.[88] Other reasons for popularity included the possibility of performing several activities at once on Facebook. Three years later, according to Alexa, Facebook is still the most used social network among Uruguayans.

3.1.3 News in Social Media

Social networks are not a major platform for consuming news and information, and blogging remains marginal. Although in-depth studies of these issues are not available, primary analysis of social networks shows that getting informed through social networks is not considered important for most Uruguayan internet users. Nevertheless, news portals such as Elpaisdigital.com, Montevideo.com, 180.com, and Observa.com, which rank among the most visited sites in Uruguay, include feeds and links to social networks.

According to Salas and Hudson, only 21 percent of young users (aged 18–24) considered Facebook "very useful" for access to information and news. Most young users in that age bracket use social networks to share personal information: 78 percent of the members use the network to share photos, 68 percent to meet with old friends again, and 54 percent to contact family and friends.[89]

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88.   Fernando Salas and Eileen Hudson, "La transformación de lo cotidiano en los tiempos de las redes sociales electrónicas" (The transformation of daily life in the time of electronic social networks), University of Montevideo, 2010, at http://www.slideshare.net/universidadmontevideo/las-redes-sociales-en-uruguay (accessed 15 June 2013).

89.   F. Salas and E. Hudson (eds), "Vidas 2.0," presentation submitted to the Forum on Reflections on Professional Issues, School of Communications, University of Montevideo, 2010 (hereafter, Salas and Hudson, "Vidas 2.0").

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A 2012 Radar Study Group study found that only 10 percent of Uruguayans have a blog. The most frequent use of a blog by bloggers was to upload content, considered "merely personal," and a minority of users relate it to their work.

3.2   Digital Activism

3.2.1   Digital Platforms and Civil Society Activism

Uruguay has a longstanding tradition of social movements with national coverage that are not formally related to the state, political parties, or religious institutions. Some of the most popular such movements are trade unions and student organizations, such as the Federation of Trade Unions and National Workers' Convention (*Plenario Intersindical de Trabajadores-Convención Nacional de Trabajadores*, PIT-CNT), and the Federation of University Students of Uruguay (*Federación de Estudiantes Universitarios del Uruguay*, FEUU), cooperative movements such as the Federation of Mutual Aid Housing Cooperatives (*Federación de Cooperativas de Vivienda por Ayuda Mutua*, FUCVAM), and social movements such as Relatives (*Familiares*). The last is a human rights organization whose members are relatives of the victims and the "disappeared" during the military dictatorship (1973–1985). Most of these movements use digital platforms to spread their claims and achievements.

Because of the country's small size and population, and given the stability of activist movements, which are few and well-known, social networks are used as a platform for mobilization and organization more than for promotion per se.

The following social movements have used digital platforms on a regular basis.

Social Housing Activism

One of the oldest national social movements in Uruguay, FUCVAM is currently the largest social organization actively promoting social housing and urban development. Comprising over 380 cooperatives and 25,000 low- to medium-income families, FUCVAM is present in almost every town in the country.

The federation's website publishes information ranging from reports on activities by member cooperatives to legal requirements for establishing a housing cooperative, to local regulations, to the price of building materials.[90] The site includes links to social networks. FUCVAM has a channel on YouTube where—as well as airing information about its activities and initiatives—it broadcasts news about national housing policy.

90.   See http://www.fucvam.org.uy (accessed 18 October 2012).

Drop the Amnesty Law

The Peace and Justice Service of Uruguay (*Servicio Paz y Justicia del Uruguay*, SERPAJ) is part of the human rights movement. During two referenda, in 1989 and 2009, SERPAJ supported the annulment of the 1985 Amnesty Law, which absolved the military from all responsibilities for human rights violations during the dictatorship (1973–1985). In 2011, following the failure of both referenda to cancel the law due to low turnout, the government submitted a new petition to Parliament for annulment. The law was finally abolished that year, but the legal debate is ongoing.

SERPAJ's website publishes information on various legal provisions and laws, discussions and details about the Amnesty Law, and other significant human rights concerns.[91]

SERPAJ has extensively used social networks in its work, mostly to convene meetings. Before the second referendum, SERPAJ used YouTube actively to boost awareness of its campaign against the law, which was poorly covered by mainstream media. Online campaigning did not stop when the second referendum failed, and activists against the military amnesty expressed their disappointment and continued to demand the abrogation of the law. The 2011 petition to Parliament received attention and comments online, particularly on Facebook. So far, the number of necessary votes for dropping the law has not been reached. The most popular call online to drop the law was "Yo Voto si a la Anulación de la Ley de Caducidad" (I vote Yes for annulling the Amnesty Law), with over 26,000 supporters.[92]

Legal Abortion: Claim Your Rights!

The campaign "Aborto Legal, son tus derechos hacelos valer" (Legal Abortion: claim your rights!) triggered one of the greatest public controversies during the mandate of President Tabaré Vázquez between 2005 and 2010 and that of the administration of President Jorge Batlle during 2000–2004.

Two different bills aimed at legalizing abortion failed to be adopted in Uruguay in the 1990s. The first was turned down by Parliament in 2003 and the second was vetoed by the president in 2008, after it had passed through both chambers of Parliament.

Despite the 2008 presidential veto, the issue has gained increasing public attention. Another new bill was submitted in 2010 by the party in power, Broad Front. The initiative received the support of the organization Women and Health in Uruguay (*Mujer y Salud en Uruguay*),[93] which created a website where it publishes abundant information about the legal process surrounding this issue and offers tools to people to interact and express their opinions.[94] In January 2011, the law was voted on again by the Lower Chamber of Parliament. It was approved by the president on 22 October 2012 and is now in effect.

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91. See http://www.serpaj.org.uy (accessed 18 October 2012).

92. See http://www.facebook.com/pages/YO-VOTO-SI-a-la-ANULACI%C3%96N-de-la-LEY-DE-CADUCIDAD/177289780408 (accessed 18 October 2012).

93. See http://www.mysu.org.uy (accessed 18 October 2012).

94. See http://www.hacelosvaler.org (accessed 18 October 2012).

> **Skip Classes**
>
> There were other specific mobilizations of less importance for mainstream society that have used social networks successfully. Such was the General Call to Skip Classes in all Uruguayan High Schools.[95]
>
> This call was made by a group created on Facebook by a student from Montevideo's "Héctor Miranda" No. 2 Public High School. The group has its roots in a proposal to skip classes on Friday, 14 May 2010, aimed at winning students a long weekend. The group reportedly received over 16,000 "likes" from secondary-education students in less than three days.[96] By that Friday, the proposal had more than 25,000 supporters[97] and generous coverage in the media. By 15 August 2012, the group had a total of 28,124 members.
>
> The group that had originally demanded a long weekend changed over time into a more articulate movement advocating on various issues, such as improving the conditions of school buildings or organizing food donations to public canteens for young children.

3.2.2 The Importance of Digital Mobilizations

Activist movements existed in the country long before the digital period, and were normally advocating on behalf of the entire society on issues such as social housing or justicial issues such as the consequences of the military regime.

The social movements described here have generally gained broad acknowledgement at national level. Mobilization is usually achieved through traditional media, while the internet serves as a backup support.

3.3 Assessments

Despite digitization and the expected increase in the number of news sources, the news offer on the internet has been quite scanty. Uruguayans have not yet shown much appetite for getting news and information from the internet. They rather associate the internet with games, social interaction, and communication. Consequently, the most significant contribution of digitization to the news diet has been in the form of feeds and content from the media to online social networks such as blogs, Twitter, and Facebook.

At present, all major social and political organizations in the country have at least a website, a blog, or an account on a social network where they publish their ideas and opinions. However, digital opportunities have not created such movements, but have rather provided additional means for amplifying their voices.

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95. The group is available at http://www.facebook.com/pages/Rateada-general-en-todos-los-liceos-del-Uruguay/111020332272660?v=wall#!/pages/Rateada-general-en-todos-los-liceos-del-Uruguay/111020332272660 (accessed 12 February 2011).

96. V. Ruggiero and D. Friedmann, "Convocan por Facebook a 'ratearse'" (Students are invited to skip school) through Facebook, at http://www.elpais.com.uy/100508/pciuda-487180/ciudades/convocan-por-facebook-a-ratearse (accessed 12 February 2011).

97. "Expectativa ante rateada nacional" (Expectation as students nationwide plan on skipping classes), at http://www.elpais.com.uy/100514/pciuda-488446/ciudades/Expectativa-ante-rateada-nacional (accessed 12 February 2011).

4. Digital Media and Journalism

4.1 Impact on Journalists and Newsrooms

4.1.1 Journalists

In recent years digitization, particularly the use of the internet, has changed the traditional ways of accessing information. However, the business model employed by the media and advertising still relies on the traditional production and investment structure and has not suffered many changes. Even when a newspaper has a digital platform, the digital version is considered a "paper's younger sibling."[98]

It was not until 1995 that the newspaper *El Observador* had its first internet portal, which was followed by the newspaper *El País* one year later. All other newspapers and weeklies in Uruguay "have changed little since their beginnings and continue to do journalism 1.0, generating little content of their own online and scarcely using hypertext in their audio and video online. Newspapers still operate basically as they did before the internet, only adding blogs, forums and such interactive tools that normally do not require additional investments."[99]

Digital media newsrooms analyzed in this section consist of 5–10 journalists plus one editor, that is, half or even less what a traditional newspaper would employ.[100] As a result, digital journalists have to be more productive in shorter periods of time, and with thinner resources. This also affects their level of specialization, which is lower than that of journalists in the printed press because online coverage of more, diverse issues in shorter articles is favored over thematic and specialized, in-depth articles.

> Portal journalists are more versatile, "jacks of all trades," than in ordinary editorial departments [of mainstream print media] where people working in one particular department deal with specific topics. But it is only in large media outlets such as newspapers that this

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98. Interview with Jimena Abad, editor of Observa.com, Montevideo, 9 December 2010.

99. Daniel Mazzone, "El periodismo ante la generación multimedia" (Journalism before the multimedia generation), in Daniel Álvarez Ferretjans, *Historia de la Prensa en el Uruguay*, Fin de Siglo-Búsqueda, Montevideo, 2008.

100. The media involved were Elpaisdigital.com, Montevideo.com, Observa.com, and 180.com, as they were the most visited news portals in Uruguay, according to Alexa and Radar.

level of specialization is possible. The work of portal journalists allows them to enrich their perspectives upon dealing with different topics in their everyday activities; however, it may also lead to a certain superficiality in the way that information is treated.[101]

The profiles of digital journalists are usually of graduates eager for experience. Therefore, the digital environment is characterized by greater mobility of personnel than the traditional print media. A good portion of journalists in digital media see this stint as a springboard to traditional formats, particularly print media, where they have higher status and the possibility of participating in the local context. Because most news portals are owned by multimedia companies, the transfer of journalists who start in digital formats to other departments of the same company has been quite significant.

Newsroom convergence is in its incipient phase, mostly propelled by editors of digital contents who negotiate such moves with print newsrooms. Oscar Vilas, editor of Elpaisdigital.com, said that "the greatest challenge is to work on the synergies between the two newsrooms, which is a slow and difficult process."[102] Production resources could be optimized by using software to create the digital version from paper text. To achieve this, permanent updating of technologies and the practical knowledge of most of the staff regarding such technical tools is essential. The business manager of 180.com, Karen Yawitz, said:

> Technology renewal happens all the time. For example, this Saturday we will introduce a new internet section, called Online Football, for which we engaged an exclusive commentator and a specialized journalist just as happens in radio and television. That way, users can follow the game on their cell phones or computers while they work, and even interact [by sending] messages to the journalist, because it all happens online. Such a move required investment in equipment … We are always investing.[103]

As far as journalistic activity per se is concerned, digitization, due to its immediacy in handling information and the continuous need to update news, has led to more detailed work in ensuring the accuracy and rigor of sources cited. Speed (getting the story first) has become the dominant trend in the media, with negative consequences for the quality of media content and verification of sources. However, there are also digital media outlets that strive to be, and are, rigorous in their work.[104] "New technologies allow for greater access to information. As a result of the internet, the work of reporters and editors has changed in the sense that there is much information available to be classified, analyzed and filtered, but it is just a quantitative matter, and has nothing to do with quality."[105]

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101. Interview with Mauricio Erramuspe, editor of 180.com, Montevideo, 17 December 2010.

102. Interview with Oscar Vilas, editor of Elpaisdigital.com, Montevideo, 28 December 2010.

103. Interview with Karen Jawitz, business manager at 180.com, Montevideo, 9 February 2011.

104. Interview with journalist Diego Muñoz, Montevideo, 31 December 2010.

105. Interview with journalist Inés Nogueiras, Montevideo, 14 December 2011.

Digitization has also sparked more news based on information from blogs and social networks,[106] often with contributions from users of social networks who provide videos, photos, and articles in real time.[107] The participation of internet users in the creation of a news article through blogs or social networks has also boosted the number of comments and responses to stories. Some news portals moderate their comments pages; others, not.

Journalists encounter in their everyday routines a variety of sources and may have the transcription ready by the end of an interview, if this was conducted by internet or email or chat. This saves the reporters time and allows them to better distribute their attention when they plan and draft their stories, have better control over the content from sources used and the accuracy of the facts gathered.

The problem not only for Uruguayan reporters but for journalists in Latin America generally, as Natalia Uval has noted,[108] is their increasing reliability on official sources. Four reasons above all explain the problem: collusion with the authorities to be the first quoting, or have exclusivity for citing government officials and senior officials in the public administration; institutional inertia ("this is how it has always been done"); adaptation to the news cycle ("everyone else has this"); failure of other social actors to make their own agenda stronger; and building a smoother relationship with the media.[109]

The immediacy and speed of news also encourage copy-and-paste journalism. Media often reuse sources and news from other sources.[110] Jimena Abad, editor of Observa.com, commented that a common practice "mostly in television, is to read news directly from our website without mentioning the source."[111] Oscar Vilas, editor of Elpaisdigital.com, said: "They [TV stations] read out our texts and never mention us as their source. However, things have started to change, but I have had to call colleagues on numerous occasions to talk about this."

Other changes in the profession of journalism experienced in the last five years do not relate to digitization but rather to changes in the political and economic conditions in Uruguay. Employment in more jobs and outlets, major gaps in salaries offered by the different media,[112] and unresolved problems related to social

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106. For instance, the newspaper *El País* has a digital section at Elpaisdigital.com, as well as sports news on Ovacióndigital.com; or Channel 10 on free television, which has its digital offer on Canal10.com.uy, and radio through Radio Carve 850 AM.

107. Interview with Oscar Vilas, editor of Elpaisdigital.com, Montevideo, 28 December 2010.

108. Natalia Uval is a reporter with *La Diaria* and teaches at the Information Faculty in the University of the Republic (Universidad de la República).

109. UNICEF, "Niñez y Adolescencia en la prensa escrita uruguaya" (Childhood and Adolescence in Uruguay's written press), Monitoreo de medios. Informe de resultados 2009, UNICEF, 2010, at http://www.unicef.org/uruguay/spanish/Publicacion_VyV_2010_finalbaja_res.pdf (accessed 1 February 2011).

110. Interview with Esteban Perrone, Professor of the University of the Republic–Communication Courses, Research Director at Data Media, Montevideo, 25 November 2010.

111. Interview with Jimena Abad, editor of Observa.com, Montevideo, 9 December 2010.

112. The minimum monthly wage in Uruguay is approximately UYU 4,659 (US$ 217). Reporters in the print media are paid a minimum of UYU 17,444 (US$ 810) a month, radio reporters UYU 14,128 (US$ 660), reporters of international news agencies receive UYU 29,861 (US$ 1,390), and television reporters UYU 26,415 (US$ 1,230). These amounts resulted from an increase of approximately 20 percent in the sector during the past decade.

benefits and gender equity in the profession continue to affect the sector. APU has called for improvements in journalists' working conditions, including proper health care, social benefits, and gender equality.

4.1.2 Ethics

There have been notable advances in guarantees for ethical journalism in the past five years. Most importantly, a Code of Professional Ethics for Journalists was approved by the board of APU on 12 April 2013, sponsored by UNESCO's International Program for the Development of Communications. This code is the first initiative in Uruguay for the self-regulation of journalism. The recommendations aim at strengthening the exercise of good-quality journalism in pursuit of rigor and balance, covering a string of issues ranging from searching for and spreading information to the characteristics of news coverage and a respect for individuals and communities by accepting cultural and social diversity, and the proper use of language.

The code's specific aims include the eradication of bad practices in journalism such as spreading material that is false, deceptive or distorted, obliging the media to correct errors, differentiating facts and opinion, and avoiding dishonest methods for obtaining information such as clandestine recordings of phone calls, the use of hidden cameras, or bribes paid to witnesses. An arbitration court was created with the purpose of promoting and applying the code. This court, elected by the members of APU, is responsible for receiving reports as well as analyzing situations and making decisions.

The Code of Professional Ethics is a valuable instrument that will be truly useful if the journalistic profession adheres to it and stands by its implementation. The ethical concerns regarding digitization most frequently expressed by those interviewed for this report relate to respect for the work of their peers, and particularly to the use of quotes and sources in drafting reports. In fact, cases of plagiarism and defamation and slanderous allegations have been formally reported. The most notorious case was that of the reporter Gustavo Escanlar, whose ethical stance was under question in 2006.[113]

A new press law (Law No. 18.515) was passed in 2009. According to Edison Lanza (professor and researcher on journalism and access to public information at the Catholic University of Uruguay), one of its drafters, the main change it introduced was the removal from the criminal code of all disputes related to freedom of expression and offenses to the honor of officials and individuals.[114] The law decriminalizes defamation and slander offenses in relation to issues of public interest, more specifically the spreading of information and opinions regarding state officials and aspects of public interest. It abolished penalties for the vilification of national symbols and offenses to the honor of foreign political leaders, and partly eliminated the offense of contempt of state officials when justified by the public interest.

In Uruguay, the ombudsman function exists only at *La Diaria* newspaper. Darío Klein, a journalist who acted as ombudsman at *La Diaria*, said that "it is not a tradition of Latin countries to include the Ombudsman

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113. For further information, see http://www.forocom.org.uy/index.php?seccion=temas&tema=Difamaci%F3nEinjurias (accessed 1 June 2012).

114. Edison Lanza, at www.apu.org.uy/noticias, 26 June 2009 (accessed 20 December 2010).

in their press rooms. Also, in economically frail media companies, the Ombudsman is mostly considered a luxury rather than an investment in improving products and in interaction with readers. We do not realize that by improving the quality of journalism in a society, we will also improve the quality of democracy."[115]

There are opposing views on the impact of digitization on professional practices and on the ethical issues that digitization raises. The editor of Montevideo.com, María Noel Domínguez, said that "professional ethics are independent from the platform or tool used by the journalist."[116] But the journalist Diego Muñoz stressed a danger that digitization posed for ethical behavior in the profession: "The possibilities of accessing media contents from the whole world may lead reporters to plagiarism, something that in fact has happened already. In the end, and despite external aspects, the journalist finally decides the journalistic work he or she wants to do."[117]

4.2   Investigative Journalism

4.2.1   Opportunities

Digitization has improved the ways of researching journalism, opening a range of opportunities for easier and faster access to national and international information, including a significant diversification of sources. This has had a direct positive effect on the quality of news produced.

In terms of numbers, the sources of information for journalists have multiplied, varying from blogs to social networks to institutions' web pages (where relevant information is provided). Moreover, on 20 December 2007, a National Archives System maintained by the government was created by law in order to preserve state documents of national importance.[118] Months later, Law No. 18.381 on the Right of Access to Public Information was approved.[119] Among other things, this law created a Unit of Access to Public Information (*Unidad de Acceso a la Información Pública*, UAIP) through the decentralization of the Agency for the Development of Electronic Government and the Information and Knowledge Society (*Agencia para el Desarrollo del Gobierno de Gestión Electrónica y la Sociedad de la Información y el Conocimiento*, AGESIC), including an advisory council.

AGESIC was created in December 2005[120] as an agency in the president's office, technically autonomous and led by an honorary board of directors consisting of five members who represent the legislature, the judiciary, the Attorney General's Office, civil society, and academia. Tasked with improving the quality of public

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115. D. Klein, "El papel social del Ombudsman" (The social role of the ombudsman), in *Niñez y Adolescencia en la prensa escrita uruguaya* (*Childhood and Adolescence in the Uruguayan Press*) UNICEF, Montevideo, 2010, p. 27, at http://www.unicef.org/uruguay/spanish/Publicacion_VyV_2010_finalbaja_res.pdf (accessed 1 February 2011). The position of ombudsman in *La Diaria* is currently vacant.

116. Interview with María Noel Domínguez, editor of Montevideo.com, Montevideo, 14 December 2010.

117. Interview with journalist Diego Muñoz, Montevideo, 31 December 2010.

118. Law No. 18.220, at www.parlamento.gub.uy (accessed 10 January 2010).

119. See www.parlamento.gub.uy (accessed 10 January 2010).

120. Article 72 of Law No. 17.930 on the National Budget.

information about ICT,[121] it drafts public regulations on computer use, monitors compliance with these regulations, provides analysis of trends in technology use, assists the state's agencies in computer problems, and provides training in e-governance.

The UAIP's main tasks include provision of assistance, training, and monitoring for the implementation of the rights of access to public information law.[122] This advisory council comprises representatives of the judiciary, the Attorney General's Office, an individual with experience in human rights (appointed by Parliament, of which he or she cannot be a sitting member), a representative of academia, and a representative of the private sector.

The law (Law No. 18.381) grants the right to access public information to all citizens with no questions asked. This law has thus also improved access to information for journalists.[123] According to the Civil Association for Equality and Justice (*Asociación Civil por la Igualdad y la Justicia*, ACIJ) and the Center for Archives and Access to Public Information (*Centro de Archivos y Acceso a la Información Pública*, CAINFO), the public institutions' respect for the law is not uniform.[124] *The Transparency Performance Index Report Online 2012* found that the goverment and the "autonomous entities"[125] show only average compliance with the obligations of transparency and interaction.[126]

The advantages and opportunities created by the internet are probably most visible in the investigative work of Roger Rodríguez, who has won repeated praise from international human rights organizations for investigating state terrorism during the military dictatorship. The documents he obtained via the internet after their release by the U.S. government were a great help. Documents provided by the state in Uruguay after access was blocked for a long time by the military were also very useful for his work.

Digitization has enabled more voices to be heard on issues that are not included in the agenda of the traditional media. In this sense, a reporter said: "It is right to say that some journalists were allowed to treat topics that they might not have considered in other media."[127]

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121. For AGESIC, see http://www.agesic.gub.uy/innovaportal/v/19/1/agesic/que_es_agesic.html (accessed 21 May 2013).

122. See http://www.uaip.gub.uy/wps/wcm/connect/a9d445804ce0387db263fafd6066fd91/Ley-18.381.pdf?MOD=AJPERES (accessed 12 May 2013).

123. Lourdes Ramos, "Acceso a la información pública y gobierno electrónico. Repercusión y aporte desde la archivística" (Access to public data and e-governance. Implications and contributions from filing activity), Masters Course in Document Management and File Administration, International University of Andalusia (Spain), 2012, and the Center for Archives and Access to Public Information (*Centro de Archivos y Acceso a la Información Pública*, CAINFO), *Venciendo la cultura del secreto* (Overcoming the culture of secrecy). CAINFO–OSF, Montevideo, 2011.

124. ACIJ-CAINFO, "Información para la acción" (Information for action), Cainfo–OSF, Montevideo, 2013, at http://www.cainfo.org.uy/attachments/324_Informe%20AIP-DESCA%20Difusion.pdf (accessed 30 October 2013).

125. "Autonomous entities" are state enterprises.

126. CAINFO-Catholic University Uruguay, *Transparency Performance Index Report Online 2012*, CAINFO-UCUDAL, Montevideo, 2012, p. 3.

127. Interview with journalist Emiliano Zecca, Montevideo, 11 January 2011.

4.2.2 Threats

Investigative journalism is rooted in the print sector. One reason why online media have not focussed on investigative reporting could be that new outlets still focus on improving their human and financial resources.

The internet has posed some threats to the work of investigative journalism. In early February 2011, a number of actual threats were received online by Mr Rodríguez because an article in the biweekly magazine *Caras & Caretas* revealed the creation of a Facebook group, styled the Forum for Liberty and Harmony, "by retired members of the military subject to investigation in relation to violation of human rights."[128] Some members of this group were directly responsible for threats to those who investigated the subject, followed by the publication of personal data of the journalist involved. These actions led to internal disagreement within the forum and the departure of a number of followers, as well as condemnation by the general public and other journalists.

4.2.3 New Platforms

Investigative journalism in Uruguay is conducted solely by traditional media, particularly by weekly newspapers. There is, however, a clear intention among some online media to do investigations despite the lack of financial and human resources.

4.2.4 Dissemination and Impact

All journalists and editors interviewed for this report agreed that the internet has significant potential for disseminating investigative reports.

4.3 Social and Cultural Diversity

4.3.1 Sensitive Issues

A sensitive issue in Uruguay is the minority population. A 2008 study, "Población afrodescendiente y desigualdades étnico-raciales en Uruguay" (The population of African descent and ethno-racial inequalities in Uruguay), a project of the United Nations Development Programme (UNDP), found that "society in Uruguay is discriminatory and Afro-descendants are the object of discrimination exercised personally and directly against them, beyond the structural segregation implied by the poverty in which these citizens live."[129]

Another problematic concern is domestic and gender violence. A 2010 study of public opinion revealed that three out of four Uruguayans see this as a very important social issue.[130] Reported incidents of domestic

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128. R. Rodríguez, "La impunidad en retirada" (Impunity in retreat), *Caras & Caretas*, 492 (11 February 2011), pp. 12–14.

129. L. Scuro (ed.), "Población afrodescendiente y desigualdades étnico-raciales en Uruguay" (The population of African descent and ethno-racial inequalities in Uruguay), UNDP, Montevideo, 2008, p. 169, at http://www.ine.gub.uy/biblioteca/Afrodescendientes.pdf (accessed 12 April 2013) (hereafter, Scuro, "Población afrodescendiente").

130. Convention of Women in Uruguay (*Plenario de mujeres del Uruguay*, PLEMUU) Foundation, "Survey on Public Opinion regarding Gender and Domestic Violence in Uruguay. Project for Strengthening the articulation of the Uruguayan Network against Domestic and Sexual Violence, and the local groups working on the issue," with the support of the European Union, at http://www.violenciadomestica.org.uy/publicaciones/RUCVDS-UE%20OP2010.pdf (accessed 8 February 2010).

violence in Uruguay rose from 5,037 in 2005 to 11,255 in 2010. Moreover, the Ministry of Internal Affairs (*Ministerio del Interior*, MI) admitted that the figures used by the National Observatory on Violence and Crime are well below the actual numbers, due to the fact that many victims do not report their cases.[131] According to data from the same ministry, 85 percent of homicide victims in Uruguay are a consequence of domestic violence. In 2010, there were 20 attempts at homicide and 35 homicides, meaning that every week, one woman was killed or had an attempt on her life in an incident of domestic violence.[132]

Issues relating to children and young people are also difficult, particularly cases of violence and criminality. A 2009 study by the Communication Agency for the Children and Adolescents, "Voz y Vos" (Voice and You), found that the topics relating to children and adolescents most covered in the media were linked with education, violence, and health. That year there was a significant increase in the press coverage of these topics: 7,393 articles were published in the print media—almost 1,000 more articles than in 2008, and 1,400 more than in 2007.[133]

Last, topics related to sexual diversity and homophobia have reached the mainstream media agenda, and their representation is the object of academic research,[134] in addition to prompting debate in different media. The Law on Same Sex Marriage, passed in 2013, is a measure of the social significance which this issue has acquired.[135]

4.3.2 Coverage of Sensitive Issues

A 2008 study on social news content in five Uruguayan newspapers (*El País*, *El Observador*, *La República*, *Últimas Noticias*, and *La Diaria*) concluded that coverage is inadequate, but nevertheless exceeds the quantity of coverage of other topics in the news.[136] The study also found that, depending on the agenda of the publication, the intensity of the coverage differs from issue to issue.

Media content on Afro-descendants has been restricted to the local context and associated in particular with music and sports (football). This discourse has further stigmatized the image of Afro-descendants, according to the UNDP study; moreover, this content is rife with inaccurate information, which is repeatedly reprinted as fact.[137] Therefore, Afro-descendants are seen as poor, uneducated people who do not have the habit of working.

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131. National Observatory on Violence and Crime (*Observatorio Nacional sobre Violencia y Criminalidad*), Ministry of Internal Affairs, at http://www.minterior.gub.uy/images/stories/violenciadomestica2010.pdf (accessed 9 February 2010) (hereafter, National Observatory on Violence and Crime).

132. National Observatory on Violence and Crime.

133. *Niñez y Adolescencia en la prensa escrita uruguaya* (*Childhood and Adolescence in the Uruguayan Press*), UNICEF, Montevideo, 2010, p. 7, at http://www.unicef.org/uruguay/spanish/Publicacion_VyV_2010_fi nalbaja_res.pdf (accessed 1 February 2011).

134. C. Muñoz, *La construcción regional de ciudadanía (homo)sexual* (Regional construction of (homo)sexual citizens), Montevideo, 2006, at http://www.rau.edu.uy/fcs/soc/Publicaciones/Libros/Archivos/LAS%20BRUJAS%2006/LasBrujas4-Mun%A6%E2oz.pdf (accessed 12 February 2011).

135. Law on Same Sex Marriage, Law No. 19.075, 13 May 2013, at http://www.parlamento.gub.uy/leyes/AccesoTextoLey.asp?Ley=19075&Anchor (accessed 12 July 2013).

136. F. Salas (ed.), *La cobertura de los temas sociales en la prensa uruguaya* (Coverage of Social Issues in the Uruguayan Press), School of Communications—University of Montevideo, Montevideo, 2009.

137. Scuro, "Población afrodescendiente," p. 169.

There has been more media coverage of domestic violence in recent years, where the media often cover all positions taken by civil society organizations such as the Uruguay Women in Black (*Mujeres de Negro Uruguay*),[138] which have a strong presence in society and are widely recognized by the general public, as well as all cases that reach the police. Coverage has increased over the past few years, often in a sensationalist manner.

UNICEF has shown that in 62 percent of crimes involving children and youth in 2011, adolescents committed the crimes; they were victims in fewer cases. Coverage of violence on the streets or within the community has been widespread. It consists, in 71 percent of these articles, of material taken from police reports.[139] Generally, young people are represented in the media as being connected to violence, which strengthens stereotypes.[140]

Coverage of sexual diversity in the media is related to specific cases such as the debate and approval of the Non-Discrimination Law No. 17.817 of 2003–2004, the debate and approval of the Common-Law Act,[141] and the adoption of children by homosexual couples. An actor often present in the media when such articles appear is the Black Sheep Group (*Colectivo Ovejas Negras*), a civil society organization created on 23 December 2004 to "battle prejudice" against sexual diversity. This group has had a positive impact.

4.3.3   Space for Public Expression

The news servers 180.com and Montevideo.com are more likely than traditional media to cover such topics, thanks mostly to their status as pure-player digital outlets, which distances them from the agenda of traditional media, according to journalists interviewed for this report. For example, 180.com has excelled at injecting more diverse voices into stories on these topics by interviewing experts, which traditional media usually do not do.

Activism on these issues features particularly in blogs. The most popular blogs on domestic violence belong to Uruguay Women in Black and the Uruguayan Network Against Domestic and Sexual Violence (*Red Uruguaya Contra la Violencia Doméstica y Sexual*), on Facebook. The Black Sheep Group maintains a blog on discrimination that all media outlets consult.

Blogs and social networks such as Twitter and Facebook have provided the communication space outside traditional media for the expression of public opinions and the positions of social, political, and cultural activists. The use of technology for such purposes is a lengthy educational and cultural process, one which Uruguayans is only just beginning.

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138. The mission of Uruguay Women in Black is to detect, archive, and report all types of discrimination against women, and to work towards the eradication of violence of all kinds. See also http://colectivomdnuruguay-ddhh.blogspot.com (accessed 1 February 2011).

139. *Niñez y Adolescencia en la prensa escrita uruguaya* (*Childhood and Adolescence in the Uruguayan Press*), UNICEF, Montevideo, 2010, p.51, at http://www.unicef.org/uruguay/spanish/Publicacion_VyV_2010_fi nalbaja_res.pdf (accessed 1 February 2011).

140. F. Chmiel, "Abracadabra, la frontera es la palabra. Percepción de jóvenes en prensa en Uruguay" (Abracadabra, the frontier is the word. The perception of youth in the press of Uruguay), Final Thesis of Degree in Sociology, FCS, Universidad de la República (UDELAR), Montevideo, 2009.

141. Law No. 17.817 Combating Racism, Xenophobia, and Discrimination, September 2004, at http://www.parlamento.gub.uy/leyes/AccesoTexto-Ley.asp?Ley=17817&Anchor= (accessed 17 October 2012).

4.4   Political Diversity

4.4.1   Elections and Political Coverage

The introduction of Web 2.0 in Uruguay shifted most political debate to digital platforms. Candidates started to use Facebook and blogs as communication channels during the 2009 election campaign.

The regulation of election campaigning has not changed as a result of digitization; there is no specific legislation for campaigning online. However, digitization has allowed political parties to extend their campaigning beyond the time allowed on traditional media. The regulations currently applying to coverage of political issues during electoral campaigns include an overall ban on political advertising for 24 hours before elections. Publication of speeches, videos, and photographs of candidates online is not subject to this rule.,

4.4.2   Digital Political Communications

One of the main aspects of digital political communications is the growing exchange between political parties and candidates and their voters through social networks. This involves especially communication among young people. Political parties have their own websites, but two political groups should be noted that have proved active online because they were not subject to control by the official management of their parties.

The first such group is Broad Front Networks (*Las Redes Frenteamplistas*), which represent the party currently in office. Built to link virtual space and the actual presence of sympathizers, Redesfa.com invites participation, particularly by youngsters, in debates on issues that are key to the Broad Front party. The network played a central role in the 2009 electoral campaign, as well as organizing debates and promotional events.

The second group is the Facebook page of Luis Alberto Lacalle,[142] a leader of the National Party and former president. Mr Lacalle was the first Uruguayan politician to open an account on Facebook. In the 2009 elections, he invited Uruguayans (especially the younger generation) to contribute columns of their own, make proposals, and pose questions. Also, just like Broad Front Networks, Mr Lacalle provided information on his Facebook page about activities and his presence at meetings across the country.

Other politicians, such as Pedro Bordaberry, the Colorado Party's presidential candidate, preferred to use Twitter to generate debate that was then reported by the traditional media as well.[143]

Young people in Uruguay use digital media more than other age groups as a source of information, including politics. Some 26 percent of people aged 18–24 who were canvassed in a survey by Salas and Hudson said that they were attracted by the presence of politicians on social networks and therefore became more interested in the electoral campaign.[144]

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142. See http://www.facebook.com/qkipresidente#!/qkipresidente?v=wall (accessed 8 January 2011).

143. See article by Darwin Desbocatti on 180.com on the intensive use of Twitter by Pedro Bordaberry, at http://www.180.com.uy/articulo/13964_Pedro_Bordaberry-abre-otra-cuenta-en-twitter-y-se-hace-seguidor-de-si-mismo?pag=2 (accessed 10 January 2012).

144. Salas and Hudson, "Vidas 2.0."

Figure 7.

Activities of young users (18–24 years) on politicians' social network profiles (% of respondents)
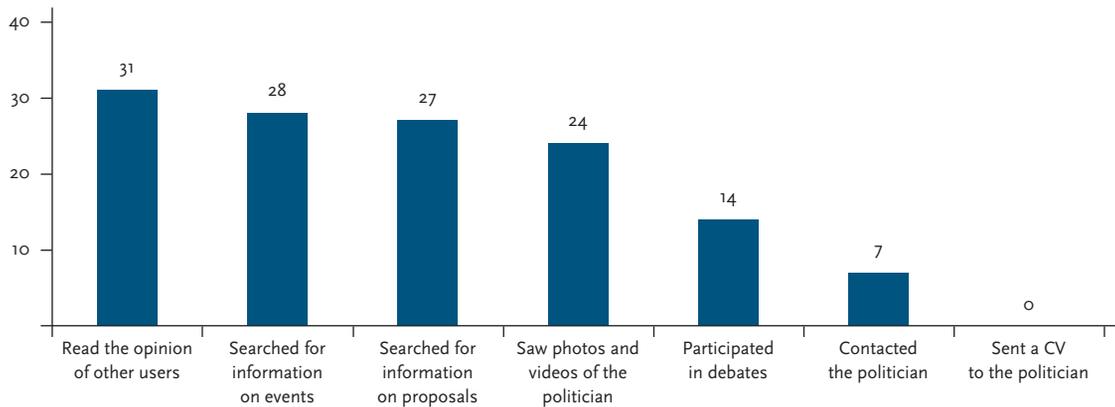
Source: Salas and Hudson, 2010[145]

Another means of dissemination much used by political activists during electoral campaigns has been SMS via mobile phones, sent mostly to voters to participate in debates. Mobile phone penetration has exceeded 100 percent in Uruguay since 2008. Journalism has also benefitted from this new practice.

4.5   Assessments

Digitization has had a positive impact on journalism as it has improved the diversity of sources, access to archives and international news agencies, and the use of multimedia resources such as photos and videos. However, journalists face the challenge of working on a myriad of different subjects at the same time and are pressured by tight deadlines. Also, digital media in Uruguay are a recent arrival, so the potential of new technology has not yet been fulfilled.

The main challenge to investigative journalism from digitization is the pressure to keep updating reports, which requires additional resources in a segment that is already carrying out a highly complex type of work.

Digitization has transformed the daily routines of journalists and improved the quality of information in the media and helped improve the coverage of socially sensitive issues that the traditional media do not treat in depth.

Digital media have undoubtedly strengthened the presence of minority groups in the news, but coverage of these groups is still not sufficient or truly inclusive. Very few such groups have managed to become part of the traditional media agenda. At the same time, certain topics and groups (such as Afro-descendants and violence

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145. See http://www.slideshare.net/universidadmontevideo/las-redes-sociales-en-uruguay, p. 54 (accessed 14 July 2013).

among youth) are still not adequately covered in the media, while other topics such as domestic violence get increased coverage, albeit mostly of a sensationalist kind.

Digitization has had an impact on political communications, influencing the approach to politics mostly among young people. Political parties have taken advantage of this during electoral campaigns.

Last, a positive development was the adoption of legislation allowing access to archives that were previously inaccessible. This has opened a new source of rich information for media coverage. Law 18.220 on the National Archives System was adopted on 20 December 2007, predating Law 18.381 on Access to Public Information, adopted on 15 July 2008. According to Lourdes Ramos, Law 18.220 constitutes "a legal instrument that guarantees the effective application of the law on access to public information" through the creation of homogeneous "procedures and operating conditions for the management of the documents in the archives of public entities, while it also guarantees the preservation of the national documental legacy."[146] In 2013, the Chamber of Deputies (Lower Chamber) amended this Law, granting state entities the power to withhold information.[147]

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146. Lourdes Ramos, "Acceso a la información pública: normativa aprobada vs. realidad instalada. Construcción de ciudadanía y derechos encontrados" (Access to Public Information: Approved Guidelines *vs.* Installed Reality. Construction of Citizenship and Opposite Rights), *Códices*, 8(2) (July–December 2012), pp. 57–76, at http://eprints.rclis.org/19901/1/Acceso%20a%20la%20informaci%C3%B3n%20p%C3%BAblica_normativa%20aprobada%20vs.%20realidad%20instalada.%20Construcci%C3%B3n%20de%20ciudadan%C3%ADa%20y%20derechos%20encontrados.pdf (accessed 14 July 2013).

147. See http://www.uruguaytransparente.org.uy/index.php?option=com_content&view=article&id=16:only-one-edit-window-how-do-i-create-read-more&catid=28:current-users&Itemid=44 (accessed 14 August 2013).

5. Digital Media and Technology

5.1   Broadcasting Spectrum

5.1.1   Spectrum Allocation Policy

An account of policy for the allocation of spectrum requires a brief account of recent institutional and regulatory changes to the media system. Other aspects that have shaped spectrum policy are the political debates and initiatives in the process of broadcast digitization.

The media have been highly concentrated in the hands of three large media groups (see section 6). This situation has lasted for several years, but in the past decade there has been a series of developments, including new regulatory bodies and laws that are expected to transform the media and institute a new order in spectrum allocation.

To start with, the institutional framework of the communications and media system has undergone substantial changes since 2000. The creation of the Unit Regulating Communications Services (*Unidad Reguladora de Servicios en Telecomunicaciones*, URSEC) under Law No. 17.296, as a decentralized agency of the government,[148] reporting directly to the president's office, marked a major break with the past, when frequency allocation was carried out by the army through the Ministry of National Defense. Law 18.719 gave URSEC powers over "the technical regulation, supervision and control of all activities related to telecommunications." Thus, URSEC became responsible for providing input to the government and its organs for formulating, implementing, and applying communications policy.[149]

DINATEL was created in December 2005 through Law 17.930, as part of the Ministry of Industry, Energy, and Mining (*Ministerio de Industria, Energía, y Minería*, MIEM). Its role is to formulate and coordinate state policies for telecommunications.

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148. "Decentralized services" are defined as public administration bodies entrusted with tasks of national scope, and empowered accordingly, while remaining fully subordinate to the government. In this sense, they differ from what are known as "autonomous entities."

149. For all the powers of URSEC, see Law No. 17.296/2001, at http://www0.parlamento.gub.uy/leyes/AccesoTextoLey.asp?Ley=18719&Anchor (accessed 23 October 2012).

In addition to these two agencies, several recent laws have influenced spectrum allocation. In 2007, all community radios became legal as a result of the Law on Community Broadcasting Service No. 18.232, which divides the media into three categories—commercial, public, and community—and guarantees spectrum to all of them.

The TCC was set up by DINATEL in 2010 to produce a report that would serve as a basis for a Law on Audiovisual Communication Services. The report was completed, but DINATEL continued to work on the final wording of the bill. On 21 May 2013, the bill was published on the presidential office website, but Parliament is continuing to debate it.

If passed, the law would fundamentally change the regulations currently governing the media system. The law has been controversial from the start. President José Mujica has said on several occasions that he would not approve a media law that took Argentina as a model. However, the proposed law does differ from Argentina's, and has the support of the president.

The extent of the changes proposed by this law (see section *2.2.1*) has generated a heated debate. Early August 2013 saw a debate at the headquarters of the Uruguay Assembly (*Asamblea Uruguay*), a political party, where different points of view were advanced.[150] Rafael Inchausti, the president of ANDEBU, criticized the regulation of content introduced by the law, and complained about the proposed investment requirements. Patricia Lussich, a former director of the Uruguayan Association of Advertising Agencies (*Asociación Uruguaya de Agencias de Publicidad*, AUDAP), opposed the regulation of advertising content, pointing out that advertising agencies already have their own Code of Ethics.

People from the political arena also offered opinions. Gustavo Gómez, the current presidential advisor on this subject, pointed out that of the 180 articles in the law, only five refer to content regulation. President Mujica remarked on 17 July that the criticism comes from "some of those who a few years back would, arbitrarily and in bulk, grant airwaves to their brethren and now make a deep voice and talk about the freedom of the press they trampled on." In turn, leaders of the opposition Pedro Bordaberry (Colorado Party) and Jorge Larrañaga (National Party) expressed negative views on the project.[151]

In a separate development, Decree-Law 585/2012 on Digital Terrestrial Television, another initiative of DINATEL, was approved by MIEM. It significantly changed the conditions for allocating frequencies and renewing licenses and aimed to democratize the media system by dividing the spectrum among all three categories of the media (public, community, and private-commercial), stimulating national production and the representation of general interest in tenders for television licenses.

The Decree-Law on Digital Terrestrial Television was applied until a new decree-law (437/012), adopted by the government on 31 December 2012, granted digital licenses to incumbent private channels without competition. This move was followed by the indefinite suspension of the call for bids for frequencies that came

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150. See http://www.uypress.net/uc_42697_1.html (accessed 15 August 2013).

151. See http://www.uypress.net/uc_42697_1.html (accessed 15 August 2013).

about through another decree-law (789/013), dated 23 January 2013. This move followed a report submitted by the Coalition for Democratic Communication (*Coalición por una Comunicación Democrática*), a civil society umbrella, to the National Institute of Human Rights and Ombudsman Office (*Institución Nacional de Derechos Humanos y Defensoría del Pueblo*, INDDHH), which claimed that the automatic award of frequencies to private broadcasters already active in free-to-air television to operate digitally was "in violation of standards established by the Inter-American Human Rights System in relation to diversity, pluralism and freedom of expression."[152]

On 2 May 2013, the government announced that the tender for digital frequencies would resume in order to award licenses to five private operators (instead of six as originally mooted by the Decree-Law of 31 December 2012), three operators from the public sector, and up to two from the community media sector. *La Diaria* reported on 2 May 2013 that the likely candidates for these frequencies in the public sector would be TNU and City TV, and possibly the University of the Republic (*Universidad de la República,* UDELAR); and for the community media licenses, the Árbol Group, the national labor union, the Federation of Trade Unions (*Plenario Intersindical de Trabajadores*, PIT) and the National Workers' Convention (*Convención Nacional Trabajadores*, CNT), PIT-CNT, and the Coalition for Democratic Communications.

The private contenders for digital licenses in Montevideo and its metropolitan area comprise a group from VTV cable channel (Saomil), a media conglomerate including *La Diaria* newspaper and a number of professionals and entrepreneurs in the communications field (Consorcio Giro),[153] the former director of *La República*, Federico Fasano, the Lecueder Group (Compañia Uruguaya de Publicidad), a group from the newspaper *El País* (Samelco), the company Oz (Consorcio POP TV), and the companies of the three analog private operators, Channels 4, 10, and 12.

At the request of the Independent Honorary Commission (*Comisión Honoraria Asesora Independiente*, CHAI) and URSEC, a public hearing took place on 31 July 2013, when six applicants for terrestrial digital television licenses in Montevideo and its metropolitan area presented their projects for evaluation. This requirement did not apply—according to Decree-Law No. 437/012—to the current free-to-air operators. According to Edgardo Ortuño, under-secretary at MIEM, "this public audience marks a turning point in the history of Uruguay media … This procedure is competitive and transparent, with a public call to interested parties, a technical evaluation, and spaces for citizen information and participation."[154]

Finally, the private digital licenses approved were Saomil (VTV), Consorcio Giro, Channels 4, 10, and 12.[155] But the way in which the government reached these decisions—including the CHAI, URSEC, MIEM, and the president's own opinions—prompted a strong public reaction and legal claim.[156]

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152. See http://www.180.com.uy/spip/IMG/pdf/Resolucion_73-2013_Tv_Digital_.pdf (accessed 15 August 2013).

153. See *La Diaria*, 6 October 2013, at http://ladiaria.com.uy/articulo/2013/10/del-consorcio-giro/ (accessed 30 October 2013).

154. See http://www.presidencia.gub.uy/comunicacion/comunicacionnoticias/ortunio-apertura-audiencia-publica-tv-digital (accessed 12 August 2013).

155. See http://archivo.presidencia.gub.uy/sci/resoluciones/2013/10/miem_976.pdf (accessed 3 November, 2013).

156. The controversy concerned POP TV and GIRO as potential new digital channels. See http://www.elpais.com.uy/informacion/pop-tv-denuncia-diaria-industria.html (accessed 30 October 2013).

Amid this bickering, mention should be made of the fact that spectrum allocation depends, institutionally and in principle, on the will of the government, with URSEC fully responsible for implementing the relevant legal and administrative procedures. According to Article 147 of Law 18.719, the government is directly responsible for approving agreements with foreign entities to start telecoms services in the country; authorizing operations of AM and FM radio stations and free-to-air television stations based on expert reports from DINATEL and URSEC; authorizing URSEC to allocate other frequencies through auctions; enabling the provision of certain telecoms services by private entities; setting prices for usage of radio frequencies (except for AM and FM radio and free-to-air television broadcasts); and deciding on penalties against parties for non-compliance with the laws.

Mobile telephony is currently provided by three operators, ANTEL (state-owned), Movistar (Telefónica of Spain), and Claro (AM Wireless Uruguay) and is regulated by URSEC. Mobile spectrum is allocated through public tenders for fixed bandwidths. No extensions are anticipated in the short term.

The Decree-Law regulating DTT sets a significant precedent because it gives spectrum to community media for the first time. Hitherto, spectrum had been shared among public and private channels only. Nevertheless, the debate between different actors from civil society and the government on DTT roll-out indicates a risk that incumbents are being favored in spectrum allocation.

5.1.2 Transparency

The Law on Community Broadcasting Service No. 18.232 in Article 3 of Chapter 1 stipulates that the state should ensure compliance with the following principles in the allocation of spectrum:

- promotion of plurality and diversity

- non-discrimination

- transparent procedures and conditions for the allocation of frequencies.[157]

In practice, however, these principles are not fully respected. A survey by DINATEL in 2010 found that only 25 percent of licensed community radios in Uruguay really were community radios, the remainder being commercial stations in disguise.[158]

The DTT Decree-Law (585/2012) guarantees the transparency of the licensing procedure for digital stations and the access of citizens to this procedure.[159] For example, it gives access to this process to the Independent Consulting Honorary Committee (*Comisión Honoraria Asesora Independiente*, CHAI), whose members

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157. The conditions for frequency allocation were nailed down in a decree dating back to 1978 (Decree-Law No. 734/978), later updated by means of Decree-Law No. 374/08 and Law Nos 14.670 and 18,232 (Law on Community Broadcasting Service).

158. World Association of Community Radio Broadcasters (*Global Asociación Mundial de Radios Comunitarias*, AMARC), "Yearly report. Diversity and Pluralism in Radio Broadcasting," 2010, p. 71, at http:/legislaciones.amarc.org/inf_Anual/Informe2010.pdf (accessed 23 October 2012).

159. See http://archivo.presidencia.gub.uy/sci/decretos/2012/05/miem_585.pdf (accessed 15 October 2012).

represent the unions of commercial radios, public and private universities, press associations, and other civil society organizations;[160] and to the Honorary Advisory Committee for Community Radio (*Consejo Honorario Asesor de Radiodifusión Comunitaria*, CHARC).[161] The latest award of digital licenses to incumbent private broadcasters without a tender was criticized by CHAI in an open letter to the president, MIEM, and the National Director of Telecommunications and Audiovisual Communication Services.[162]

Public hearings for granting and renewing licenses form a major contribution to transparency in spectrum allocation. The first public hearings in the tendering process took place in 2008 in the cities of Bella Unión, Chuy, and San Gregorio de Polanco.[163]

Lastly, the bill on audiovisual communication services, sent to Parliament on 21 May 2013, includes recommendations from various players such as media entrepreneurs, members of various associations, and academics. This is a positive development as the input from these players helped to bolster transparency in the process of frequency allocation. The bill also requires all frequency allocations to be made through open public competition.

Unfortunately, despite all these laws and procedures, several irregularities have been detected and reported in the frequency allocation process, which either exploit loopholes in the law or pass unnoticed by regulators, mainly URSEC.

5.1.3   Competition for Spectrum

Incumbent media operators have applied various forms of pressure on the government to prevent new competitors from entering the market. One such example was the lobbying by the broadcasting industry, represented by ANDEBU, concerning the bill on community radio.[164]

The association has also objected to several provisions in the digital television law. In the first place, ANDEBU opposed the introduction of the possibility for the government to revoke digital licenses, which did not exist in the analog era. ANDEBU also wants guarantees for the continuity of the services provided by incumbent commercial broadcasters as in the past,[165] opposing the limitation of licenses to 15 years with a renewal option for 10 more years. The renewal decision is, according to legislation, to be made by the government depending on compliance by broadcasters with their programming plan, as assessed by CHAI, and if no other

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160. Paragraph XII, Decree-Law nNo. 585/2012.

161. See http://amarcuruguay.org/documentos/miem_247-17ago2010.pdf (assessed 15 October 2012).

162. Carta de la CHAI al Presidente de la República por preocupaciones sobre implementación procedimientos de television digital privada (CHAI Letter to the President about digital televisión procedures with private broadcasters), distributed: 083/13—Exp. No. 251900-000209-13—Session 7-03-13, at http://www.comunicacion.edu.uy/sites/default/files/Resolución%20de%20la%20Comisión%20Honoraria%20Asesora%20Independiente.pdf (accessed 12 May 2013).

163. See http://archivo.presidencia.gub.uy/_web/uruguay_cambia/boletin/pdf/u_cambia_086.pdf (assessed 15 October 2012).

164. See the debate process on the community radio bill at www.parlamento.gub.uy (assessed 15 October 2012).

165. Statements by ANDEBU to the news portal 180.com at http://180.com.uy/articulo/22097_Andebu-denuncia-ilegalidades-en-decreto-de-TV-digital (accessed 15 October 2012).

competitors to the spectrum exist, in which case the government should organize a new tender. ANDEBU also opposed the provision that stipulates the allocation of up to 20 digital channels in Montevideo, claiming this would saturate the advertising market. ANDEBU stated that

> the bill is unlawfully restrictive and represents an obstacle—as it implements several requirements of questionable legitimacy—to the continuity in the provision of services by the current operators of free-to-air television, thus putting seriously at risk the right to information and freedom of expression.[166]

Finally, ANDEBU opposed the appointment of the public broadcaster TNU and the telecoms company ANTEL as the sole entities authorized to provide access to transmission infrastructure for providers of digital television services. As the TNU-ANTEL joint venture is in sole charge of licensing digital multiplex operators, ANDEBU described the situation as legitimating a monopoly.

5.2   Digital Gatekeeping

5.2.1   Technical Standards

The decision in late 2010 to adopt the Japanese standard instead of the initial preference for the European standard, was made by the president's office with no prior public debate. The president argued that the switch was motivated geopolitically, to align Uruguay with the standard adopted by neighboring countries, particularly Brazil. Uruguay's decision was dictated rather by regional geopolitics. Critics objected that this switch was unplanned: the European standard had already been chosen, and funds allocated as a result of that choice had already been released and were being spent.

5.2.2   Gatekeepers

Digitization of television is incipient in Uruguay. Therefore, there are still no positive or negative trends related to gatekeepers that could be mapped out. Digital broadcasting terrestrially was started in August 2012 by TNU. Analog switch-off is scheduled for 21 November 2015.

5.2.3   Transmission Networks

URSEC is responsible for regulating and supervising compliance with the conditions for the use of digital licenses that are granted by the government. A private corporation, RUTSA, is the sole transmission company in the country, using relay stations and local channels to distribute the content of national channels.

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166. Public claims by ANDEBU regarding the Query on the Project for a Decree-Law on Digital Television. See http://historico.elpais.com.uy/120609/pnacio-645416/nacional/Decreto-de-TV-digital-fue-impugnado-por-Andebu/, and http://ladiaria.com.uy/articulo/2012/5/ni-me-callo-ni-me-voy/ (both accessed 12 May 2013).

RUTSA is co-owned by the three largest media groups in Uruguay by sales revenues: Romay-Salvo/Romay Eccher, Fontaina-De Feo, and Cardoso-Pombo Scheck. Its business is the transmission of the content of free-to-air television stations in the provinces. RUTSA has its own news program. The content transmitted nationally by RUTSA consists of the three private free-to-air television channels with national coverage, plus two of RUTSA's own broadcasting stations located in Durazno and Paso de los Toros. RUTSA also distributes locally the programming of approximately 20 free-to-air television stations based in the provinces.[167]

According to a study by Lanza and Buquet,[168] small broadcasters in the provinces do business with RUTSA because they have no choice: RUTSA monopolizes program provision in the provinces. They only fill one hour of programing with local productions and the local newscast. All the rest is furnished by RUTSA, drawing from the three main free-to-air television channels plus RUTSA's own newscast. In exchange, the provincial channels give RUTSA the advertising revenue from two of the four advertising slots aired every hour. Such arrangements prevent local broadcasters from investing in local production. Moreover, it ensures RUTSA's easy dominance of three main segments: production, transmission, and content distribution.

5.3   Telecommunications

5.3.1   Telecoms and News

News services are a priority for media outlets because they bring high ratings in radio and free-to-air television (see section *1*). There are no specific data about the volume of news on platforms run by telecoms companies, but it is obvious that the use of cell phones for public campaigns on issues of public interest has risen.

ANTEL has made significant progress in distributing news by developing exclusive portals for mobile telephony.[169] From 1991 to 1994, the company Abiatar was hired by ANTEL to provide mobile telephone services. As of 1994, ANTEL started to offer the same service through its own company, ANCEL. The first auction to allocate frequencies for mobile telephony took place in 2002, and Abiatar was awarded a license to operate on its own. A third operator, AM Wireless Uruguay, appeared in 2004, initially providing services under the brand name CTI and later as Claro. That same year, Abiatar was bought by Telefónica Group and started to operate as Movistar.[170]

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167. RUTSA distributes the following free-to-air television channels: Channel 12 in Melo, Channel 3 TV in Artigas, Channel 10 in Bella Union, Channel 11 in Treinta y Tres, Channel 7 in Tacuarembó, Channel 8 in Rosario, Channel 9 in Paso de los Toros, Channel 11 in Durazno, Channel 3 in Paysandú, Channel 10 in Guichón, Channel 10 in Rivera, Channel 8 in Salto, Channel 4 in Chuy. Also, through the Fontaina-De Feo Group, it owns Channel 7 Cerro Pan de Azúcar in Maldonado and Channel 9 (Rocha); and through the Romay Group, it owns Channel 3 in Colonia, Channel 4 in Dolores, and Channel 12 in Fray Bentos.

168. G. Buquet and E. Lanza, "La televisión privada comercial en Uruguay" (Private commercial television in Uruguay), Friedrich Ebert Foundation in Uruguay (FESUR), 2011, at http://library.fes.de/pdf-files/bueros/uruguay/08659.pdf (accessed 30 June 2012) (hereafter Buquet and Lanza, "La televisión privada commercial").

169. See www.antel.com.uy (accessed 15 October 2012).

170. URSEC, "Report on Uruguay's Telecommunications Market. 2006. Economic Consultancy Area of the URSEC," Montevideo, 2007 (hereafter, URSEC, "Report on Uruguay's Telecommunications Market").

According to URSEC's 2012 report on the telecoms market, the mobile telephony operator with the greatest number of subscribers in December 2012 was ANTEL, with a share of 47 percent, followed by Movistar (39 percent), and Claro (17 percent).[171]

Data and internet access were exclusively provided by ANTEL through Anteldata until 1998, when authorizations were granted to install and operate wireless broadband networks (LMDS) for transmitting data.[172] Information from URSEC also indicates significant growth in data transmission. From June 2008 to December 2012, the telephone lines connected to the internet through dial-up decreased significantly to only 1,052, while broadband subscriptions surged to 563,108.

In the internet access and broadband service market, in December 2012, ANTEL was the market leader with 97 percent of subscriptions, followed by Dedicado (2.7 percent).

Data from URSEC show a slight increase in subscriptions to cable television from 2004 to December 2012, when the total stood at 576,198. The main operators by number of subscribers at national level are "Others"—different small operators—with 39 percent; DirecTV with 14 percent; Bersabel (Cablevision) with 10 percent; Tractoral, the operator of Televisión cable color (TCC), with 8 percent, Riselco (operator of Nuevo Siglo Cable TV) also with 8 percent, and Multicanal (Multiseñal) with 3 percent; Montecable with 8 percent, Audomar (Cablevisión) 2 percent, Cable Plus 3 percent, and Consorcio San Fernando 5 percent.

5.3.2   Pressure of Telecoms on News Providers

Telecoms have not exerted significant pressure on media content producers chiefly because no serious convergence of the two sectors has taken place. The only instance of pressure was represented by requests from cable companies to City TV not to air national newscasts because that would create competition for the main commercial channels, which were distributed by the cable companies. This requirement was included in the initial contract with City TV in 1996. So far, the channel has not produced news programs, instead airing some informative content through non-news programs, such as "*Los Informantes*" (The Informants), a satirical program about television news, which airs in primetime from Monday to Thursday. Another program called "*Montevideo al día*" (Montevideo up-to-date), about city life, is broadcast three days a week.

5.4   Assessments

Spectrum was allocated for many years without any formal regulatory mechanisms. As such, the current media system comprising free-to-air analog television and pay-TV, as well as AM and FM radio, is the product of the allocation methods of the past century, which in many cases followed a political logic.

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171. URSEC, at http://www.ursec.gub.uy/scripts/locallib/imagenes/Informetelecomunicacionesdic2012.pdf, p. 11 (accessed 14 July 2013).

172. URSEC, "Report on Uruguay's Telecommunications Market."

Many radio stations are still closely related through ownership to politicians and political parties who use them as a platform for transmitting political content. In the case of free-to-air commercial television, where such links to political parties have not been uncovered, television outlets have remained conservative and loyal to the traditional parties.

In recent years, the situation in the frequency allocation process has slowly begun to change thanks to a slew of rules and laws. The creation of URSEC in 2001 as a body responsible for allocating frequencies, and its empowerment in 2010 as a supervisory regulator (see section *5.1.1*), has led to the establishment of more objective criteria for licensing radio and television.[173] Additionally, as of 2008, the Law on Community Broadcasting Service established criteria for creating community media.

More recently, along with the creation of DINATEL within MIEM, new spaces independent from the political world for dialog among stakeholders have been created. The creation of the TCC (see section *5.1.1*) and its role in the adoption of the audiovisual communications services law, and the public consultations on the implementation of digital television, are clear examples of this.

In sum, this is a period of opportunities and significant risks for the media system. There has been little progress in digital convergence. More progress has been achieved in the creation of institutions and frameworks for this process and debates about the future media system. However, only a few of these initiatives have had the support of political parties. One significant example was the approval of the Decree-Law on Digital Television in 2012, a breakthrough for spectrum allocation in the digital era.

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173. Under Law 18.719 of 2010, URSEC obtained new powers as a regulator of the activities linked to telecoms (see section *5.1.1*).

6. Digital Business

6.1 Ownership

6.1.1 Legal Developments in Media Ownership

The regulations for managing and controlling radio spectrum include provisions for assigning frequencies for specific and general uses through open tenders,[174] a procedure that is intended to prevent large businesses from owning all the radio broadcast resources available, and to ensure access to frequencies for civil society organizations.[175]

Nevertheless, so far, the media market has been dominated by three business groups which own a "network of integrated media."[176] They are also linked by strategic alliances—in the case of cable television with the companies Equital SA and Multiseñal Digital—and (in the case of RUTSA) with small-scale local broadcasters throughout the country. In the opinion of some experts, this situation hinders access for newcomers to the market.[177]

The Decree-Law on Digital Television in 2012 introduced new rules on media ownership in line with the new realities in the digital era (see section *5.1.3*). According to this law, individuals applying for a digital license must have Uruguayan citizenship, reside in the country, and prove that they have funds to start such an enterprise, among other things. In the case of companies, all stock must consist of registered shares which include the names and stakes of shareholders. The law does not allow for the transfer of licenses.

Several of the regulations in this law aim to prevent concentrations and generate more transparency in the media market while also preventing control of the media by foreigners. This series of regulations are a landmark

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174. Articles 2 and 24 of Decree-Law No. 114/003.

175. Article 13 of Decree-Law No. 374/008.

176. M. Becerra and G. Mastrini, "Los dueños de la palabra" (The Owners of the Word), p. 154, at www.ipys.org (accessed 15 October 2012) (hereafter, Becerra and Mastrini, "Los dueños de la palabra").

177. Buquet and Lanza, "La televisión privada comercial." According to the authors, through joint ventures operated as a cartel, the three large media operators Equital, Multiseñal Digital, and RUTSA control almost the entire commercial free-to-air television market as well as cable television in most of the country. Equital was a monopoly in the subscriber television market until DirecTV and the Clarín Group entered the game. RUTSA basically provides content produced by the three main private channels in Montevideo or acquired by each of them abroad to local television operators in the provinces.

measure in the state policy on communications, aimed at creating a more democratic and pluralistic media system despite the high level of concentration.

Owners of various media outlets have strongly opposed several provisions in this decree-law and called for their removal, arguing that they infringe on freedom of expression principles, according to ANDEBU (see section *5.1.3*).

Other pieces of legislation, such as the bill on audiovisual communication services, have brought in similar regulations, but with broader applications, covering all communications media regardless of technology. These provisions have not yet been adopted. Overall, the regulatory changes triggered by the transition to DTT have not led to major changes in the ownership structure of private television. They just open the door to a previous cable television channel (VTV) and a television initiative by *La Diaria* newspaper—beyond the three existing big ones.

6.1.2   New Entrants in the News Market

Several changes have taken place in the past decade in media ownership.

The first major event was the arrival of foreign capital, which acquired several national media outlets. *La República* reported that the ownership of the radio stations run by the Sarandí Group was transferred to the Claxon Group[178] in 2004.[179] Five years later, the civil society Media and Society Group (*Grupo Medios y Sociedad*, MSG) denounced to URSEC the purchase by the Mexican entrepreneur Angel Gonzalez—allegedly through front men or figureheads—of the companies belonging to the Sarandí Group (later to Claxon) and to the Del Plata Group (owned by Miguel Sofía).[180] Although control of the media through figureheads (known as *testaferros* in Uruguay) is banned by law, foreign entities continued to enter media through such individuals, which affects the transparency of media ownership. The report was shelved by MIEM in October 2012.

Second, in January 2011, 60 percent of the shares in *La República* were taken over from Multimedios Group by an Argentinian media group controlled by Gustavo Yocca and Miguel Jorge. The Multimedios Group, managed by the journalist Federico Fasano, controls the cable television channel TV Libre, Radio AM Libre, the news portal LR21, and the newspaper *La República*.

In television, the same three groups—Romay-Salvo, Fontaina-De Feo, and Cardoso-Pombo Scheck—continue to dominate the free-to-air and cable markets.

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178. Claxon is a Chilean group that is part of the Cisneros Group of Venezuela.

179. See http://www.lr21.com.uy/politica/144418-grupo-claxon-del-multimillonario-cisneros-desembarco-en-uruguay-y-ya-es-propietario-de-tres-emisoras-sarandi-futura-y-sport (accessed 15 July 2012).

180. See http://grupomediosysociedad.blogspot.com/2010/03/una-investigacion-oficial-y-nuevos.html (accessed 3 June 2012).

The new entrants in the print sector in recent years were the newspapers *Plan B* and *TU*, which managed to survive for no longer than one and a half years.

A major entrant in the past decade is the newspaper *La Diaria*, which emerged in 2006 as a publication touting a progressive and leftist independent alternative.[181] The newspaper, basing much of its distribution on prepaid subscriptions, has become a major player.

In the online market, Elespectador.com became established as a news portal competing directly with Uruguay's leader in this field, Montevideo.com.uy. Along with the increasing presence of media online came the sole online-only news portal, 180.com, in 2008. Subsequent entrants in the online market are news websites developed by print outlets, the most prominent being Observa.com, Elpaisdigital.com.uy, and Subrayado. com.uy.

The Decree-Law on DTT is expected to pave the way to the entrance of new private media outlets.

6.1.3   Ownership Consolidation

Limits on concentration of media ownership were established by Decree-Law 734/978,[182] which bans ownership of more than two frequencies in each of the three broadcast frequency bands or frequencies in all three bands altogether (AM, FM, TV).[183] Nevertheless, the media system is characterized by extreme concentration.

Free-to-air nationwide television in Montevideo is controlled by three media conglomerates: Channel 4 (Romay-Salvo/Romay-Eccher Group), Channel 10 (Fontaina-De Feo Group), and Channel 12 (Cardoso-Pombo Scheck Group).[184] These groups also hold four of the five pay-TV licenses in the capital city and—through RUTSA and Equital—they also control the distribution of content of all free-to-air television stations and pay-TV services in the provinces. Some of them also own radio stations and in one case, the main newspaper in Uruguay by circulation, *El País*.[185]

In that sense, Uruguay is one of the countries with the highest concentration of media in Latin America, due to an oligopoly made up of the three large multimedia operators.[186] The three operators work from Montevideo, but through RUTSA they control the rest of the country.

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181. See http://www.mateamargo.org.uy/index.php?pagina=notas&seccion=matofono&nota=129&edicion=7 (accessed 15 November 2012).

182. Decree-Law 734/978—20 December, 1978. Actualizado Decree-Law 327/80 y 350/86. At www.ursec.gub.uy/scripts/locallib/imagenes/Decreto_734_78.doc (accessed 5 June 2012).

183. Article 12.

184. Buquet and Lanza, "La televisión privada commercial."

185. G. Gómez, *Television digital terrestre en Uruguay* (Digital Terrestrial Television in Uruguay), ICAU/PACC-DIPRODE-OPP, Montevideo, 2010, at http://www.mec.gub.uy/innovaportal/file/5551/1/tv_digital_terrestre_en_uruguay.pdf (hereafter, Gómez, *Television digital terrestre en Uruguay*) (accessed 24 June 2013).

186. See http://historico.elpais.com.uy/110128/pnacio-543779/nacional/diario-la-republica-cambia-de-dueno (accessed 18 May 2012).

The Romay-Salvo/Romay-Eccher Group has been owned from its very start by María Elvira Salvo de Martínez Arboleya and her children Walter Angel, Hugo, and Daniel Romay. At present, this group is the owner of the corporation Montecarlo TV Channel 4, with national coverage, which is the group's flagship channel, plus Channel 11 in Punta del Este, Channel 8 in Rosario, Channel 4 in Dolores, Channel 3 in Colonia, and Channel 12 in Fray Bentos. Also, this group jointly owns with the other two major groups, Fontaina-De Feo and Cardoso-Pombo Scheck Group, the Uruguayan television transmission company RUTSA. In the pay-TV market, The Romay-Salvo/Romay-Eccher Group owns Montecable Video in Montevideo, Del Faro TV Cable in Colonia, and Fray Bentos Video Cable in Río Negro. It also co-owns—along with the Fontaina-De Feo and Cardoso-Pombo Scheck Group—the company Equital, which controls the pay-TV market in the provinces. The Romay-Salvo/Romay-Eccher Group also controls the AM radio station CX 20 Montecarlo, the FM station Radio Cero, and Radio Cero Punta and FM del Rio in Colonia.

The Fontaina-De Feo Group came about through the merger of the Fontaina and De Feo families. At present, half of the assets of the group belong to the De Feo family and the other half to the Fontainas. In the free-to-air television market, the group currently controls Saeta TV Channel 10 with national coverage, the group's flagship channel, in addition to Telesistemas Uruguayos, the company running Channels 9 in Rocha and 7 in Pan de Azúcar (Maldonado). In the pay-TV market, the group owns the companies Tractoral (TCC) in Montevideo, Rodacil (Rocha Cable Color,) and TDH Satelital, and Radio AM CX 16 (Radio Carve) and Radio AM CX 24 (Nuevo tiempo).

The Cardoso-Pombo Scheck Group is controlled by several family groups; most shares are held by the Scheck family, which retains the key management positions.[187] In the free-to-air television sector, this group currently controls the company Televisora Larrañaga which owns Channel 12, "La tele," the most popular channel in the group, and Channel 2 in Punta del Este (Maldonado). In the pay-TV sector, the group controls the companies Riselco (Nuevo Siglo) in Montevideo and Latinoamérica Televisión. It used to have a share in the radio station CX 32 Radiomundo, though no longer.

A 2009 study for the Press and Society Institute (*Instituto Prensa y Sociedad*, IPYS) by Guillermo Mastrini and Martin Becerra concluded that in all the markets analyzed (free-to-air television, pay-TV, basic telephony, and internet), Uruguay shows very high levels of ownership concentration.[188] In 2004, the average market control of the leading operator in any of these markets in Uruguay exceeded 60 percent of the total turnover and 56 percent of the audience. The combined control of the top four operators added up to 94 percent of the audience, and 89 percent in regards to turnover. In 2008, the situation was more or less unchanged (see section *6.1.3*).

According to Edison Lanza, there is no regulation prohibiting a single family from being sole owner of several media outlets, as is the case with the Del Plata Group. The lack of regulations on ownership of platforms

187. L. Stolovich, *Mapa del poder económico en los medios masivos de comunicación en el Uruguay* (Map of Economic Power in the Mass Media in Uruguay), FESUR, Montevideo, 2003 (hereafter, Stolovich, *Mapa del poder económico*); Gómez, *Television digital terrestre en Uruguay*.

188. Becerra and Mastrini, "Los dueños de la palabra."

such as cable television and the internet permits cross-ownership of traditional media (television, radio, the press), cable television, and internet portals. Mr Lanza opined that the legislation does not take any account of audience in measuring concentration of media ownership, which is worse when the media that dominate the market have nationwide coverage. The high concentration of media ownership is made possible by a combination of limited legal provisions and the extensive use of figureheads to purchase stakes in media companies. Use of figureheads is both illegal and very difficult to prove.[189] This level of concentration is believed to have a negative impact on the diversity and pluralism of media output.[190]

6.1.4 Telecoms Business and the Media

The only significant initiative to link telecoms and the media has been the CARDALES Plan, the Convergence Plan for Access to Recreation and Development of Employment Alternatives and Sustainable Enterprises (*Plan CARDALES, Plan de Convergencia para el Acceso a la Recreación y al Desarrollo de Alternativas Laborales y Emprendimientos Sustentables*), set up by ANTEL in 2009 (see section *7.1.1.2*). The purpose of this plan was to guarantee access for most of the population to a multimedia package. This package consisted of basic telephony, broadband internet, mobile telephony, and cable television, and it came at an overall cost of UYU 600 (US$25) a month. However, competition in all these areas from cable operators discouraged ANTEL from pursuing the plan, which was eventually scrapped. ANTEL, which has a monopoly on the fixed telephony market in Uruguay, rejected the participation of private actors in the plan, which led to the cancellation of the project.

6.1.5 Transparency of Media Ownership

All audiovisual media outlets must be registered with URSEC. Registration includes the personal data of the owners and the legal representatives of the companies. The registry is open to the public and easily accessible. However, as mentioned above, the use of figureheads to purchase media outlets is allegedly widespread, and is certainly difficult to expose. This has a major negative impact on ownership transparency.

In the case of websites, the situation is different: there is no legal obligation to be registered anywhere, and the ".com.uy" domain is managed by a public office that reports to the MEC.

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189. Interview with Edison Lanza, Montevideo, 17 February 2011.

190. For more about concentration of ownership in Uruguay's media and its impact on pluralism and diversity, see C. García Rubio, *El Uruguay cableado, actualidad de la televisión de pago* (Uruguay by cable: the situation of pay-TV), Zeitgeist, Montevideo, 1998; Stolovich, *Mapa del poder económico*; G. Kaplún, "Políticas de comunicación en Uruguay: agenda pendiente y agenda pública" (Communication policy in Uruguay: pending agenda and public agenda), *Derecho a Comunicar*, No. 1, January–April 2011, at http://www.derechoacomunicar.amedi.org.mx/pdf/num1/3-uruguay.pdf (accessed 10 September 2013); Gómez, *Television digital terrestre en Uruguay*). On diversity in television output, see G. Buquet, E. Lanza, and R. Radakovich, *Diversity in Uruguayan Television*, Montevideo, 2013, at http://www.fesur.org.uy/archivos/file/Anali-sis%20Buquet_Lanza_Radakovichv.pdf (accessed 10 September 2013).

6.2 Media Funding

6.2.1 Public and Private Funding

The main source of income for both print media and free-to-air television is commercial advertising. In the case of pay-TV and the internet, the bulk of sales revenue comes from subscriptions. The total advertising spend in 2012 amounted to UYU 5,699 million (US$ 266 million), more than double 2005. Overall, the advertising spend increased steadily between 2005 and 2012.

Figure 8.
National advertising spend (US$ million), 2005–2012
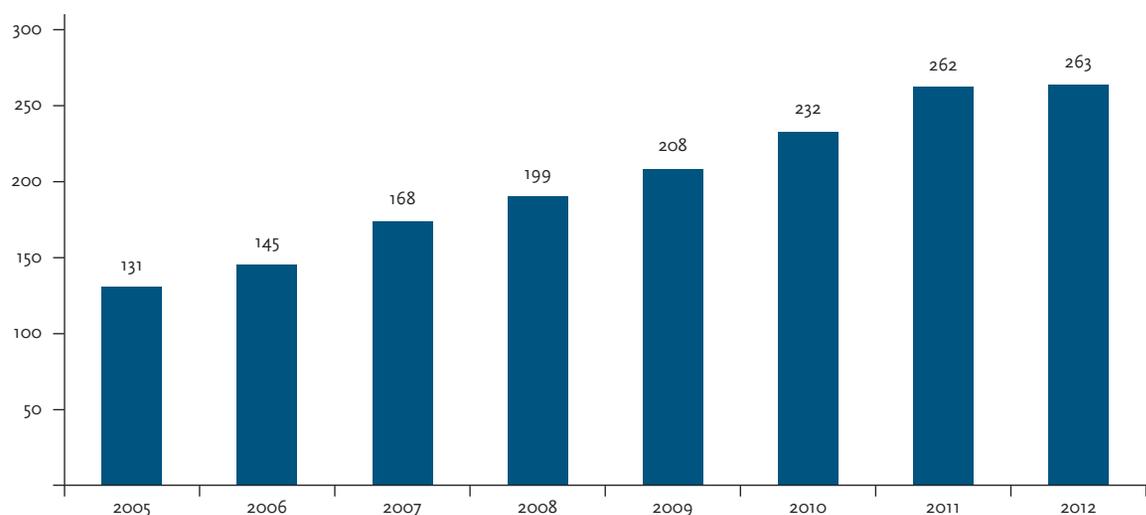
Source:　　AUDAP[191]

The largest sectors by income from advertising expenditure, print, and television, also grew between 2006 and 2010. Advertising revenues pulled in by newspapers and magazines increased from US$ 2.1 million in 2006 to US$ 2.5 million. Free-to-air television, on the other hand, saw much slower growth, from US$ 13.12 million in 2006 to some US$ 13.61 million in 2010, according to AUDAP.[192]

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191. See http://www.audap.com.uy (accessed 13 April 2013).

192. See http://www.audap.com.uy/noticias/la-industria-publicitaria-y-su-impacto-en-la-economia-nacional-2010.pdf (accessed 12 July 2013).

Figure 9.

National advertising spend in print and free-to-air television sectors (US$ million), 2007–2011

■ Budget allocation ■ Advertising and sponsorship
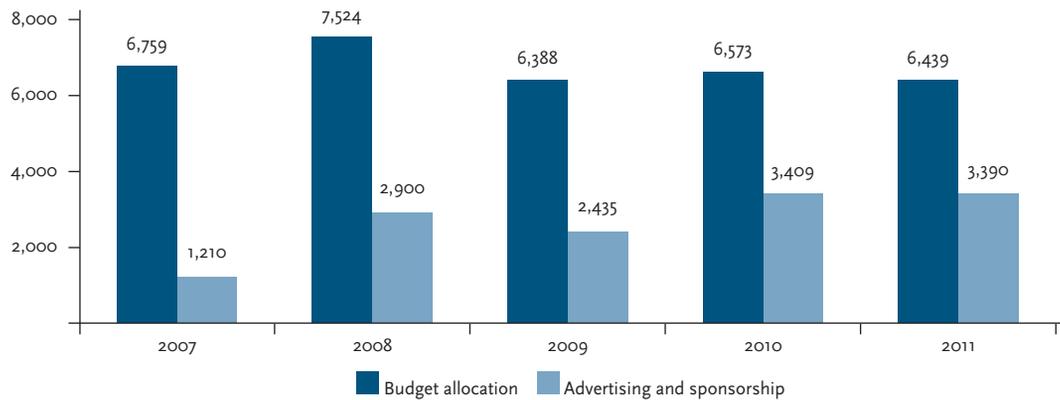
Figure 10.

Public radio's annual budget (US$ '000), 2006–2009
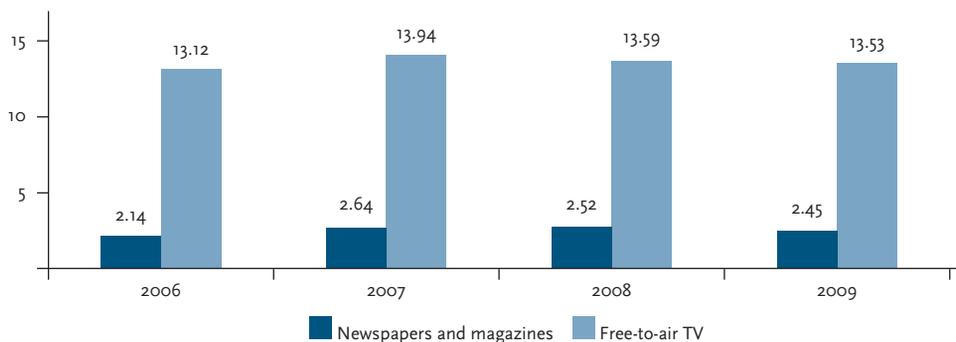
■ Newspapers and magazines ■ Free-to-air TV

Turnover in the free-to-air television sector has remained stable in recent years for the channels owned by the three largest groups, which pulled in together in 2008 almost 99 percent of the overall market turnover, according to IBOPE data.[194] The biggest share (38.7 percent) went to Channel 12 (Cardoso-Pombo Scheck Group), followed by Channel 4 (Romay-Salvo Group) with 30.9 percent, and Channel 10 (Fontaina-De Feo Group) with 29.4 percent.

TNU's Channel 5 is funded through a combination of revenues from airtime rented to private operators, commercial advertising, and state financing. A comparison of the turnover of the public channel and the private channels shows that public television accounts for an insignificant portion (a bit over 1 percent) of

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193. See http://www.audap.com.uy (accessed 13 April 2013).

194. IBOPE, in Becerra and Mastrini, "Los dueños de la palabra."

the total amount invoiced by the free-to-air television industry. According to data from TNU, the channel's budget amounted to UYU 76.7 million (US$ 3.57 million) in 2012, down from UYU 79 million (US$ 3.66 million in the previous two years.

Table 9.
TNU's budget, 2010–2012

Year	UYU	US$
2010	79,690,000	4,139,740
2011	79,140,000	4,111,168
2012	76,740,000	3,986,493

Source: TNU, in response to a Special Information Request for this report, 28 September 2012

A study by Buquet and Lanza revealed that the turnover of free-to-air commercial channels in 2010 was as follows: UYU 489.74 million (US$ 22.83 million) for Montecarlo Television, UYU 491.90 million (US$ 22.93 million) for Saeta Channel 10, and UYU 667.43 million (US$ 31.12 million) for TV Larrañaga (Channel 12).[195]

The pay-TV market has grown over the past few years, which saw the arrival of new providers, including Cable Plus and DirecTV. The competition led to significant drops in the sales revenues of the top four operators, which together represented 40 percent of the market in 2010, a long way down from their 74 percent in 2004.

Table 10.
Market share (by turnover) of main pay-TV operators (%), 2010–2012

Pay-TV Operators	2008	2009	2010	2011	2012
Cablevisión	11	11	10	11	10
Nuevo Siglo	10	10	10	9	8
TCC	12	10	10	9	8
Montecable	10	10	9	9	8

Source: URSEC[196]

Buquet and Lanza estimated the 2010 turnover of the three largest groups in the cable television market as follows: UYU 420.39 million (US$ 19.59 million) for the Romay-Salvo Group; UYU 448.56 million (US$ 20.9 million) for the Fontaina-De Feo Group; and UYU 424.73 million (US$ 19.8 million) for the Cardoso-Pombo Scheck Group.[197]

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195. Buquet and Lanza, "La televisión privada comercial," p. 23.

196. See http://www.ursec.gub.uy/scripts/templates/portada.asp?nota=Contenidos/Info%20Mercados/Telecomunicaciones (accessed 10 February 2013).

197. Buquet and Lanza, "La televisión privada comercial" (Commercial televisión channels), FESUR, 2012, p. 24.

In the print media sector, the four main operators—*El País*, *La República*, *El Observador*, and *Últimas Noticias*—accounted for 70.2 percent of all the revenue in the market in 2008, and 95 percent of the total circulation in the country, according to IBOPE.[198] These represented increases of almost 45 percent and over 50 percent respectively, compared with 2004. Although all the newspapers increased their circulations during this period, *El Observador* managed to grow its revenue more than its competitors and in 2008 it took 20 percent of all revenue in the sector, lifting it into second place ahead of *La República* (Fasano Group), which had 18 percent of all revenue. *El País*, belonging to Cardoso-Pombo Scheck, still led in 2008, with 42 percent of the overall revenue and 46 percent of the total circulation (12 percent more than in 2004).

A major issue is the role of official state advertising. According to a 2008 study for the Civil Rights Association and the Open Society Justice Initiative (OSJI), the system of allocating official advertising has not only swelled the pockets of some media outlets to the detriment of others, but has also contributed to a decline in diversity and freedom of expression as it has denied access to this funding to media identified with the political opposition.[199] However, no data are available to gauge the importance of this funding source in the total pool of revenues of media companies.

Based on information from managers, owners, and business managers in media outlets interviewed for this report, official advertising may represent anything from 5 percent to 50 percent of total income for these companies. The most popular daily newspaper in the country, *El País*, revealed that 8 percent of its turnover in 2007 was generated by official advertising.[200] The same year, Channel 12, among the most viewed free-to-air television channels, indicated that official advertising amounted to 5 percent of its total revenue.[201] Official advertising accounted for 8 percent of the total income of the radio stations El Espectador, Sarandí, and Futura in 2007.[202]

According to business managers of the two leading news portals, 180.com and Montecarlotv.com, state advertising represented approximately 20 percent of their total advertising income in 2011.[203]

Under Law 17.904 (Article 17) of 2006, 20 percent of advertising by the government and the "autonomous entities" has to be spent on national public television, TNU.[204] Currently, the president's office is analyzing

198. IBOPE, in Becerra and Mastrini, "Los dueños de la palabra."

199. G. Gómez and E. Lanza, "El precio del silencio: abuso de publicidad oficial y otras formas de censura indirecta en América Latina" (The Price of Silence: Abuse of official advertising and other forms of indirect censorship in Latin America), Asociación por los Derechos Civiles (Association for Civil Rights)/Open Society Justice Initiative, New York: Open Society Institute, 2008, at http://www.flip.org.co/resources/documents/dac4b90b50c9cd3a226e9861d799d382.pdf (accessed 21 May 2013).

200. See http://www.libertad-expresion.org.mx/wp-content/uploads/2009/01/Libro-Libertad_de_expresion_y_publicidad_oficial.pdf, p. 43 (accessed 12 July 2013).

201. See http://www.libertad-expresion.org.mx/wp-content/uploads/2009/01/Libro-Libertad_de_expresion_y_publicidad_oficial.pdf, p. 43 (accessed 12 July 2013).

202. See http://www.libertad-expresion.org.mx/wp-content/uploads/2009/01/Libro-Libertad_de_expresion_y_publicidad_oficial.pdf, p. 44 (accessed 12 July 2013).

203. Interview with Karen Jawetz, business manager of 180.com, Montevideo, 9 February 2011.

204. See Law 17.904, Article 17, at http://www.parlamento.gub.uy/leyes/AccesoTextoLey.asp?Ley=17904&Anchor= (accessed 31 October, 2013).

a project to regulate the allocation of official advertising as a whole. This project is supported by the Press Organization of the Provinces (*Organización de la Prensa del Interior*, OPI), the Association of Radio Stations in the Provinces (*Asociación de Radios del Interior*, RAMI), and the Oro Network (*Red Oro*).[205] Because of serious concerns over the distribution of advertising between Montevideo and the provinces, this project has not yet been approved.[206]

6.2.2 Other Sources of Funding

Portals such as Diarioelpais.com.uy, Observa.com.uy, and Elespectador.com.uy have their own advertising resources and have built pay-walls round their digital news. Even so, neither advertising nor subscription has become a significant source of income.

ANTEL has made attempts to generate content in combination with traditional media and productions for mobile telephones through various alliances with digital portals. According to the advertising expert Isidra Delfino, a former director of strategic communication at Publicis-Impetu advertising agency, transition to digital platforms as a sound business proposition is only a matter of time.[207]

6.3   Media Business Models

6.3.1   Changes in Media Business Models

According to Ms Delfino, Uruguayan media continue to rely on their traditional business models. The analog media business, television as well as print media and radio, depends largely on income from advertising. There are specific and exceptional cases of print media outlets that pull in healthier revenue from sales and, to a lesser extent, from subscriptions to digital platforms. *La Diaria* lives mainly from readers' subscriptions, but also from advertising, and some weekly publications such as *Búsqueda* and *Brecha* survive mainly because of subscriptions and direct sales.

Internet advertising has advanced quite significantly, According to the Uruguayan Interactive Advertising Bureau (*Bureau Uruguayo de Publicidad Interactiva,* IAB), it increased by 50 percent in 2011 to an estimated total of UYU 195 million (US$9 million). That would put the share of online advertising in the total advertising expenditure close to 5 percent.[208] A 2009 study revealed that a quarter of the total number of internet users had shopped online.[209]

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205. See http://www.radiosredoro.com.uy (accessed 23 August 2013).

206. See   http://www.sociedaduruguaya.org/2012/12/decreto-que-regulara-la-asignacion-de-publicidad-oficial-recibe-respaldo-de-las-gremiales-de-medios-del-interior.html (accessed 12 July 2013).

207. Interview with Isidra Delfino, former director for strategic communication of Publicis-Impetu, Montevideo, 15 February 2011.

208. See http://www.iab.com.uy/noticias/iab-news/resumen-del-iab-forum-2011 (accessed 18 October 2012).

209. IAB-Uruguay, "Cifra. Los medios interactivos y los uruguayos" (Cifra. Interactive media and Uruguayans), 2009, at http://www.iab.com.uy/wp-content/uploads/IAB.UY-Los-medios-interactivos-y-los-uruguayos-Cifra-DIC-2009.pdf (accessed 18 October 2012).

Nevertheless, Ms Delfino still thinks that the migration of advertisers online is a slow process: "Uruguay is currently undergoing a transition to a different model that calls for marketing strategies more segmented towards different targets." She suggests that "Digital media still belong to the sphere of BTL [below the line] marketing, associated with direct marketing, public relations, and social networking. Even the business focus remains on traditional media, especially television."

In television, interactivity is seen as an additional variable in the digitization process, with results yet to be confirmed. According to Channel 4's marketing manager Mariano Mosca and business manager Jorge Spinella,[210] new potential instruments in digital television such as direct sales of products and services could be offered to advertisers in addition to discounts for users when they use television for shopping. However, the channel has yet to design a strategic plan for such new sales channels.

Overall, it may be inferred that Uruguay still lacks new business models for digital portals or DTT.

6.4   Assessments

Most of Uruguay's radio and television stations, as well as much of the printed press, are owned by a few business groups. The media system is, in general, highly concentrated in terms of ownership. The consolidation of cable television has not had any effect on this situation.

Although no single group controls the whole market, the few groups operating the media in Uruguay have built a sort of oligopoly. This situation has not been changed by digitization, though changes may commence upon the implementation of the Decree-Law on Digital Terrestrial Television, which is expected to enable competition in the private television sector and to allow newcomers to enter. Moreover, more diversity is expected to come with this process as the decree-law reserves spectrum for community media, broadens the space available to the public media, and multiplies the number of private television channels, in addition to imposing rules that are to increase the transparency of media ownership.

Although legal mechanisms and institutional procedures guaranteeing ownership transparency do exist, they fail to deliver transparency in practice. Some social organizations such as the MSG, AMARC-Uruguay, and the Coalition for Democratic Communication (*Coalición por una Comunicación Democrática*) demand more information about media ownership and monitoring by the state of these companies to prevent abuse of their dominant positions.

Despite the technological innovations that digitization brings, the principal business model among Uruguay's media is still based on private and state advertising. This model does not seem to encourage diversity, pluralism, or independence of the media. New financing options that include a diversified and multiplied system of sources of income (subscribers, advertising, direct sales, and so forth) are needed.

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210. Interview with Mariano Mosca, responsible for marketing and programming analysis, and Jorge Spinella, business manager at Channel 4, Montevideo, 16 February 2011.

7. Policies, Laws, and Regulators

7.1   Policies and Laws

7.1.1   Digital Switch-over of Terrestrial Transmission

7.1.1.1 Access and Affordability

The Decree-Law on Digital Terrestrial Television set the date of 21 November 2015 for analog switch-off. In preparation, legal and regulatory procedures are being put in place. MIEM and DINATEL are running a public awareness and information campaign about DTT that started at the Rural Exhibition in the Prado Park of Montevideo.

Set-top boxes to receive digital signals are due to be introduced in 2014 at a unit cost of UYU 2,190 (US$ 100). The government has undertaken to consider subsidizing such devices for lower-income households. No public information about the definition of which households would qualify for such subsidies has yet been disclosed.

A principal objective of these subsidies is to ensure universal access to digital signals, especially in rural areas and regions bordering on to Brazil and Argentina, where access to free-to-air television and radio broadcasting is rather limited. In some border cities, people have access only to media from neighboring countries.

7.1.1.2 Subsidies for Equipment

The most important document foreseeing subsidies for digital reception equipment was the CARDALES Plan, launched in 2008. Its main goal was to provide a framework for social inclusion by connecting society's underprivileged sectors through triple-play services consisting of internet connection, pay-TV, and a landline telephone connection.[211]

The government established an Executive Committee in 2008 to implement the CARDALES Plan,[212] which proposed that the Plan should be a launching pad for DTT, bringing together public and private operators.

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211. Decree-Law 39/010 of 1 February 2010, Consideration I.

212. Decree-Law 831/008 of 30 December 2008.

In 2009, a decree-law enabled all companies identified by the CARDALES Plan to submit a coverage plan, while the fixed telephony service in the triple-play package was reserved for ANTEL.[213] A pilot plan was started on 28 August 2009 in the city of Trinidad to see how the plan would function. Households in Trinidad were offered a package of eight television channels, including private, public, free-to-air, and cable stations, some of which had interactive services. ANTEL added telephone services and Asymmetric Digital Subscriber Line (ADSL)-based internet access. In the end, only ANTEL and another operator were part of the pilot project.[214] The lack of success of this phase of the project led to its cancellation in 2010 when President Tabaré Vázquez's administration ended the plan with a decree-law, which also created an Assessment Committee to evaluate the pilot project in Trinidad.[215]

There is still no official information on the plan to subsidize low-income homes' purchase of digital set-top boxes. The current director of DINATEL, Sergio De Cola, has said that his organization is exploring how to facilitate access to digital television for citizens who cannot afford the device.[216]

7.1.1.3 Legal Provisions on Public Interest

Broadcast services are deemed of public interest in the Radiobroadcasting Act (Law No. 14.670 of 2008, Article 1). However, diversity, political, social, and cultural pluralism, inclusion of minorities, the search for innovation and creative risk-taking, among other principles relating to the public interest concept, are not catered for in the legislation except with respect to the role of public media.

Progress in advancing the public interest in the media was made through the Community Broadcasting Law No. 18.232, which called for equal distribution of the frequency spectrum to three categories of media: private-commercial, state, and community.

Additionally, through the Decree-Law on Digital Terrestrial Television, several new procedures have been introduced to ensure the presence of the public interest principle in the creation of television content in general. For example, the decree-law stipulates that the regulator should favor those bids in the licensing process that include local audiovisual productions in their program plans, work with independent producers, and provide access to broadcasting for the disabled. The body in charge of evaluating these proposals is CHAI, whose members represent the trade unions of commercial broadcasters, the public university, private universities and press associations, among others. Public hearings of these bids are also envisaged by the decree-law.

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213. Articles 2 and 3 of Decree-Law 537/009 of 30 November 2009.

214. E. Lanza, "El Cardales inaugura nueva época en la televisión; cables de Montevideo tienen visiones distintas sobre cómo integrarse" (El Cardales opens new era in televisión: Montevideo cables have different views on how to integrate), *Búsqueda*, 1523, 27 August 2009.

215. Decree-Law 39/010 of 1 February 2010.

216. F. Muslera, "Gobierno concederá seis licencias privadas" (Government grants six private licenses), *El Observador*, 26 August 2012, at http://www.elobservador.com.uy/noticia/231118/gobierno-concedera-seis-licencias-privadas-para-television-digital (accessed 15 May 2013).

Article 15 in this decree-law sets forth the obligation, for the projects selected, to devote up to 15 minutes daily, free-of-charge, to airing public campaigns by official agencies, and to give free access to interactive services provided and developed by the state, including e-government, health, and education, among others.

7.1.1.4 Public Consultation

During the past five years, the government has set forth mechanisms for citizens' participation in the regulation and formulation of public policies for communications in several ways: the creation of consulting committees, open public consultations such as queries online, and public hearings in the decision process of the allocation of frequencies. The creation of consulting committees was part of the process of drafting the bill for audiovisual communication services, and was requested by DINATEL. The outcome was the TCC, consisting of entrepreneurs from the media, civil society organizations, academics, and representatives of DINATEL.[217] Through its work the committee fostered a dialog between players to identify agreements and disagreements.[218]

Prior to its approval, in October 2011, the decree-law was up for comments from the general public and all stakeholders through DINATEL's webpage. DINATEL has also helped create consulting committees consisting of representatives of civil society organizations and academics, among others, to evaluate community radios and digital television projects.

A fourth element in building public consultation—and probably one of the most revolutionary participation mechanisms in communications policies in Uruguay to date—has been the launch of public hearings for projects submitted by bidders in tenders for digital licenses for community media and commercial media.

The Law on Community Broadcasting Service was a landmark in guaranteeing citizens' participation in the application of regulations for community radio broadcasts and in the definition, implementation, and monitoring of policy on community media.[219]

The Decree-Law on Digital Terrestrial Television introduced the idea of civil society participation in the allocation of frequencies. CHAI and other forums have also been created, for example a Consulting Forum on Digital Television (*Foro Consultivo en Televisión Digital*), with representatives from the academic sector and civil society, among others.[220]

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217. The functioning and membership of the TCC was based on a public consultation mechanism established by DINATEL through the website Consultapublica.info, where civil society organizations and citizens could submit their own contributions. The committee has received through this channel contributions from AMARC, the Uruguayan Chamber for Pay-TV (*Cámara Uruguaya de Televisión para Abonados*, CUTA), AN-DEBU, Association of Radio Stations in the Provinces (*Asociación de Radios del Interior*, RAMI), the Actors' Trade Union (*Sindicato Único de Actores*, SUA), the Association of Cinema Producers and Film-makers of Uruguay (*Asociación de Productores y Realizadores de Cine del Uruguay*, ASOPROD), and the Coalition for Democratic Communication. ANDEBU expressed its disagreement with their minority position within the TCC, where it had only three out of a total of 15 seats.

218. The members did not represent the organization or sector to which they belonged: they participated as individuals with their own personal contributions.

219. Article 14 of Law No. 18.232.

220. Decree-Law 585/012, Article 21, at http://archivo.presidencia.gub.uy/sci/decretos/2012/05/miem_585.pdf (accessed 28 September 2013).

Unfortunately, while civil society organizations, academics, and business stakeholders have been involved in recent debates on new regulation and changes in the media system, the general population knows little about these discussions. A recent study indicated that only 37 percent of the population knows that the government plans to introduce a new law on audiovisual communication services.[221]

7.1.2 The Internet

Significant advances have been achieved in digital inclusiveness. The "one laptop per child" policy, developed by Nicholas Negroponte at the Massachusetts Institute of Technology (MIT)[222] led to the creation of the CEIBAL Project. This is part of a national strategy for the information and knowledge society (see section *3*), drawing on the Agency for the Development of Electronic Government and the Information and Knowledge Society (*Agencia para el Desarrollo del Gobierno de Gestión Electrónica y la Sociedad de la Información y el Conocimiento*, AGESIC) "2008–2010 Uruguay Digital Agenda," as well as the Strategic Plan of the National Agency for Research and Innovation (*Agencia Nacional de Investigación e Innovación*, ANII).[223] This plan was designed by the government on the basis of a presidential decree of December 2006. It involves a complex scheme organized between the National Elementary Education Administration (*Administración Nacional de Educación Primaria*, ANEP), the Technological Laboratory of Uruguay (*Laboratorio Tecnológico del Uruguay*, LATU), and MEC.

By 2011, the CEIBAL Project had delivered 455,970 laptops in the public education system, of which 325,651 went to elementary school students and 99,497 to high school students.[224] By 2012, the Project had delivered 500,000 laptops.[225] Ana Laura Rivoir Cabrera, a sociologist and communications scholar, has pointed out that the project is part of a wider social inclusion strategy to reduce inequalities in digital inclusion.[226] On the other hand, the project has faced a series of technical and training difficulties of implementation as there was no previous policy in this area; as a result, planning and implementation occur simultaneously.

A positive aspect of the CEIBAL Project is that people see it as part of a public policy aimed at digital equality, untainted by politics. Over 92 percent of people in Uruguay think that the project "allows children to come in contact with the world," while more than 85 percent see it as a form of "enhancing the children's future." Support has been enormous, with civil society launching initiatives to support the plan on a voluntary basis,

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221. E. Alonso, G. Caetano, and F. Beltramelli, *La ciudadanía y su relación con los servicios televisivos y los cambios tecnológicos* (Citizenship and its relation to television services and technological changes), PRODIC-ICP-MIEM-DINATEL, Montevideo, 2013. At http://www.comunicacion.edu.uy/sites/default/files/La%20ciudadan%C3%ADa%20frente%20a%20los%20cambios%20tecnológicos%20PRODIC%20DINATEL_0.pdf (accessed 15 May 2013).

222. For the "one laptop per child" idea, see see http://rapceibal.ning.com (accessed 15 May 2012).

223. See ANII's general guidelines at www.anii.gub.uy (accessed 10 November 2012).

224. For further information on the CEIBAL Project, see www.ceibal.org.uy and www.ceibal.edu.uy (accessed 21 May 2013).

225. See www.ceibal.edu.uy/Articulos/Paginas/ceibalometro-2012.aspx (accessed 20 May 2013).

226. A. Rivoir, "Innovación para la inclusión digital. El Plan Ceibal en Uruguay" (Innovation for Digital Inclusion. The Ceibal Programme in Uruguay), *Mediaciones sociales*, 2009, Universidad Complutense de Madrid, at http://pendientedemigracion.ucm.es/info/mediars/MediacioneS4/Indice/RivoirCabrera/rivoircabrera.html (accessed 2 July 2012); http://www.bitacora.com.uy/noticia_1482_1.html, p. 5 (accessed 28 June 2012).

the most important of which was the Support Network for the CEIBAL Plan (*Red de Apoyo al Plan CEIBAL*), known as RapCEIBAL.[227]

In a separate development, a more conventional perspective on access to the internet by all citizens is ANTEL's initiative called "All households" (Universal hogares), aimed at connecting every household in the country to the internet. Since April 2012, ANTEL has been carrying out a door-to-door survey among households with a fixed telephone line but no internet connection in low-income districts of Montevideo to offer an internet connection for a one-off payment of only UYU 490 (US$25). This makes Uruguay one of the few countries in the world where fiber-optic-based connection is offered to all households as part of a national plan.

Other initiatives by ANTEL have proven that the company has managed to position itself as a strategic actor in facilitating the generation of internet content. According to its director, ANTEL has made significant investments in infrastructure to enhance and enlarge content production online. For example, it set up a Data Center that helps generate audiovisual content.[228]

7.1.2.1 Regulation of News Content on the Internet

There are no specific regulations in place to govern internet content. According to Martín Prats,[229] an expert on the subject, there is an ex-post regulation applicable to press services that covers all communication media. There is no applicable legislation for the regulation of mobile telephony content, and the applicability of press services stipulations depends on each court's decision.

7.1.2.2 Legal Liability for Internet Content

Legal liability for media content was included in the Communications and Information Law (No. 16.099 passed in 2009). Publishers have the obligation to submit, prior to spreading or publishing any content, an affidavit to the MEC consisting of the title of the planned publication and the names of the editor in charge, and the owner or legal entity involved in the outlet.[230] This is basically a registration procedure. So far, the ministry has not rejected any such application. People or entities that feel affected by the content in the respective publication have the right to reply by filing a request in the court. If the court agrees, the outlet in question must publish the reply within 48 hours.[231]

Law No. 16.099 also defines offense in the media as follows: when an outlet knowingly publishes false information that disturbs public order. In addition, media are accountable for violations of similar information-related provisions from the Civil Code.[232] The law also considers the author of the article and

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227. For further information, see http://rapceibal.ning.com (accessed 15 May 2012).

228. See http://medios.presidencia.gub.uy/jm_portal/2012/genericas/Revista-politicas/politicas7.pdf (accessed 10 December 2012).

229. Interview with Martin Prats, professor of communication, University of the Republic (UDELAR), Montevideo, 17 December 2010.

230. Article 3 of Law No. 16.099.

231. Article 9 of Law No. 16.099.

232. Article 19 of Law No. 16.099.

the publisher equally responsible for the offense. The editor in charge or the publisher is required by the same law to disclose sources that are not revealed in the story, if this is demanded by a third party.[233]

As no specific regulations have been defined for digital media, the Communications and Information Law applies to the internet as well. Different experts have pointed out the need for a general regulatory framework to address the problems raised by these new platforms. According to Javier Berdaguer, a lawyer specializing in intellectual property, "effective mechanisms to protect rights when they are infringed over the internet" are needed. The lawyer Martín Colombo, on the other hand, suggests "there is a lack of regulation on computer crimes and on net neutrality, and to start with we need to define who are audiovisual communicators, how are they regulated, and what their obligations are."[234]

7.2   Regulators

7.2.1   Changes in Content Regulation

There is no specific law on regulating content, as such provisions are scattered in a number of decree-laws and laws on broadcasting.

The main regulations on content are contained in Law No. 17.823 of 2004, in line with the Childhood and Adolescence Code: these form a series of obligations aimed at protecting children and adolescents, such as bans on violent or discriminatory content, including advertising.[235]

Content on community media is regulated by the Law on Community Radio Broadcasting (Law No. 18.232 of 2008). According to Article 4, the programming of these media must consist of their own national or local production. The same article also requires these media to give space to independent productions provided by civil society organizations.

Content on digital television is regulated by the Decree-Law on Digital Terrestrial Television. Provisions include requirements for national productions, financial support for independent producers included in the programming scheme, and access for the disabled.

Content on free-to-air television is governed by an initiative of 20 June 2012, when the Security Cabinet—comprising the MI, the Ministry of Defense, the Ministry of Social Development, and the Ministry of External Affairs—proposed a set of measures to improve the security of all citizens.[236] The proposal includes the amendment of Decree-Law No. 488/88 to change the times of programs not proper for minors and

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233. Article 25 of Law No. 16.099.

234. See http://blogs.montevideo.com.uy/blognoticia_58047_1.html (accessed 20 May 2012).

235. Articles 181, 182, and 183 of Law No. 17.823.

236. See http://www.presidencia.gub.uy/wps/wcm/connect/presidencia/portalpresidencia/comunicacion/comunicacionnoticias/gabinete-seguridad-presento-paquete-15-medidas-promover-convivencia-ciudadana (accessed 25 October 2012).

included among newscasts. The measures also include a commitment to promote dialog with the media, media workers, university institutions, and civil society, with a view to adopting self-regulation schemes regarding information relating to security and violence.

An important initiative for the regulation of audiovisual media content in Uruguay was the bill on the Promotion of National Culture, Cinema, Radio, and Television, aimed at promoting the cultural rights of all citizens. The bill implied that a quota should be reserved for national production on free-to-air television (both public and private channels) and radio stations. However, such provisions were included in the audiovisual communication services bill that was submitted to Parliament for approval in May 2013.

7.2.2   Regulatory Independence

From 2001 to 2010, URSEC was entirely responsible for licensing broadcasters. In 2010, this task reverted to the government, which defines policy on digital television spectrum, leaving URSEC to implement this policy, including managing the frequency allocation.[237]

URSEC is a decentralized body of the government (see section *5.1.1*),[238] consisting of a committee of three members appointed by the president who is also entitled to dismiss them upon the recommendation of the government. The law requires these members to be independent from the media (but not from political parties) and to be objective and impartial in fulfilling their duties. To ensure their independence, members cannot have any professional links to managers of operators that are regulated by URSEC and are not allowed to run for official positions subject to elections before at least one term of office has passed from the date of their dismissal or resignation.[239] President Mujica's government has allowed opposition representatives to participate in the URSEC committee, with one position on the board of directors.[240]

The CHAI was appointed for DINATEL, which, along with several other entities, assesses proposals for frequency allocation. Representatives from civil society have also been involved in the creation of a Consulting Forum on Digital Television (see section *7.1.1.4*). The creation of the CHARC, the CHAI, and the Consulting Forum are significant advances in ensuring political independence for the regulators.

DINATEL can propose telecoms policies. However, the president's office continues to be responsible for adopting public communications policies.

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237. Articles 143 and 145 of Law No 18.719.

238. Article 70 of Law No. 17.296.

239. Articles 75 to 79 of Law No. 17.296.

240. At present (21 May 2013) the members of the board of directors at URSEC are Gabriel Lombide (chairman), Marianela Delor (director), and Gustavo Delgado (director), the last representing the opposition.

7.2.3   Digital Licensing

In analog television, permits for frequency use are approved by the government and are directly granted by DINATEL in line with Articles 143 and 145 of Law No. 18.719. The technical assistance for such assignments is provided by URSEC, currently consisting of members of various political parties whose directors must fulfill various formal requirements to ensure the transparency and independence of their decisions. The present government authorities permit the participation of members from the opposition on URSEC's committee (see section *7.2.2*).

Licenses for commercial digital television have recently been awarded.[241] The Decree-Law on Digital Terrestrial Television of April 2012 put forward clear guidelines: a limit of 15 years for the license duration, previously established requirements, and the creation of the CHAI to deal with public calls for the allocation of frequencies. This committee comprised different actors, independent from the government in office and political parties in general. The inclusion of actors not related to the political system was expected to provide the new system governing frequency allocation with greater trust and transparency.

7.2.4   Role of Self-regulatory Mechanisms

The main self-controlling mechanism applied by URSEC is the Code of Ethics of Regulators.[242] This code establishes the protection of users' rights as the main purpose of regulators. The central principles in this code are probity, moderation, equity, legality, diligence, suitability, veracity, and responsibility.

Self-regulation has also been considered by the bill for audiovisual communication services, now under review in Parliament. The bill proposed the creation of a media ombudsman to defend the interests of audiences. Some media, such as the newspaper *La Diaria*, have an ombudsman appointed by direct votes of the readers.

In September 2012, the OPI, APU, the Archives and Access to Public Information Center (*Centro de Archivos y Acceso a la Información Pública*, CAINFO), and the GMS organized a UNESCO-sponsored First National Debate on self-regulatory mechanisms and ethics in the media. This was aimed at appointing a committee of experts for the preparation of a code of ethics for the press.[243] The Code of Ethics for Professional Journalists was approved on 12 April 2013 at a meeting of the APU (see section *4.1.2*).

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241. See MIEM Resolution 659/13, at http://www.presidencia.gub.uy/normativa/resoluciones/resoluciones-10-2013 (23 October 2013).

242. Decree-Law No. 206/2002.

243. See "Debate Nacional sobre autorregulación ética en periodismo y medios de comunicación" (National debate on ethical self-regulation in journalism and media), at http://www.avisador.com.uy/actualidad/opinion/3333-debate-nacional-sobre-autorregulacion-etica-en-periodismo-y-medios-de-comunicacion-.html (accessed 24 August 2012).

7.3   Government Interference

7.3.1   The Market

According to all experts interviewed for this report, there is no distorting intervention by the state in the media in Uruguay. Mr Gómez said that official advertising is not used as a form of reward or punishment, for it is not allocated to favor certain media outlets according to political preferences.[244] Studies by AMARC and APU supported this view. At the same time, the allocation of state advertising is rather chaotic, for it does not follow an explicit and well-articulated policy, respecting professional criteria.

The position of officials from the leftist government that has ruled during the past two terms of office has been critical of the media, but no intervention at policy level on the editorial lines of the media has been detected.[245]

7.3.2   The Regulator

Until the creation of URSEC and DINATEL, media regulation was hardly transparent. Despite their ups and downs, these two institutions have shown commitment to establishing transparent criteria for frequency allocation, updating legislation, and regulating community media and digital television, among other things. At the same time, they have been subject to the president's ambiguous position in defining communication policies in recent years. Those projects are now finally on the right track, and the president supports these initiatives. The weaknesses in the current structure of the media are more the heritage of the previous vacuum of regulations and rules than the result of regulations and communications policy.

At present, the decree-law on DTT restricts even further attempts at interference by regulators, as frequency allocation will be subject to an assessment by the CHAI committee and will be discussed in public hearings. As a counterpart of the committee's power, a Technical Consulting Forum is also to analyze the overall guidelines for communications policy, with entrepreneurs themselves taking part (see section *7.2.4*).

7.3.3   Other Forms of Interference

All analysts interviewed for this report about other forms of interference with the media agreed there have been no cases where state authorities have exerted pressure outside the legal framework of digital media. The only mechanism recognized by the analysts regarding the capability for pressure by the government on the media is the assignment, or not, of state advertising.

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244. Interview with Gustavo Gomez, Montevideo, 28 March 2012.

245. See also the positive report of the Organization of American States (OAS), Inter-American Commission on Human Rights (*Comisión Interameri-cana de Derechos Humanos*, CIDH), 2008 Yearly Report, Volume III, "Informe Anual de la Relatoría Especial para la Libertad de Expresión" (Annual Report of the Rapporteur for Freedom of Expression); also OAS-CIDH, *Una agenda hemisférica para la defensa de la libertad de expresión* (A Southern Hemisphere Agenda for the Defense of Freedom of Expression), 2009, p. 82, at http://www.oas.org/es/cidh/expresion/docs/publi-caciones/Agenda%20Hemisf%C3%A9rica%20Espa%C3%B1ol%20FINA%20con%20portada.pdf (accessed 23 June 2013).

7.4   Assessments

The past five years have seen a series of regulatory changes in the media in addition to the introduction of more transparent mechanisms of public involvement.

In DTT, the decree-law covering this area is a significant move as it establishes new regulatory mechanisms for the allocation of frequencies, with clear rights and obligations on frequency licensees. It also conceptually reformulates the social purpose of television, proposing ways for upholding the public interest in programming and requirements to boost local content.

The latest regulatory provisions have helped enrich diversity and pluralism in spectrum allocation and in output by creating space for community television and extending the space for public television. Until recently, the community sector was subject to persecution and closures, while public television was not seen as a priority in communications policy.

Other progressive provisions are aimed at increasing local and national audiovisual production, particularly national drama and independent productions, which were—before the most recent laws—not explicitly included in media regulations or part of other initiatives.

Compared with the analog era, there are now fresh debates and renewed participation in shaping the new media policy and system. A positive development is the inclusion in the discussions on communications policies of civil society organizations through various mechanisms created by DINATEL, such as the TCC, and the CHARC and CHAI committees. In addition to this, public hearings and consultations of licensing acts are envisaged.

A positive precedent was the involvement of civil society, academics, professional organizations, and trade unions in the preparation of an information report for the parliamentary bill on audiovisual communication services. That report was significant in three ways: it was the first initiative for regulation based on services, not technology, thus increasing the scope of regulation; it acknowledged three sectors in communications: commercial, community, and state, consistent with the regulation of recent years; finally, it called for transparency in the allocation of frequencies, thus continuing the progress achieved recently.

The report also set limits to media ownership concentration, pursuant to a decree-law dating from the dictatorship, which is still in force today (Decree-Law No. 734 of 1978). The report also proposed a regulation aimed at ensuring a certain amount of local content in programming and called for protection of the rights of vulnerable groups such as children and the disabled. Civil society representatives and academics surveyed for this study all firmly agreed on the need to pass into law the bill on audiovisual communication services.

The biggest challenges in the transition to digital are, in sum, the following: a weak institutional capacity for processing changes and an undefined political will to adopt specific measures despite the government's surprising approval of the Decree-Law on Digital Terrestrial Television, which seems to indicate a new attitude in that sense.

DINATEL has proposed more democratic mechanisms for decision-making regarding access conditions and regulation. In this sense, DINATEL has become increasingly a legitimate space for the production of communication policies. The key actor in adopting such policies, however, continues to be the president's office.

8. Conclusions

8.1   Media Today

8.1.1   Positive Developments

Over the past decade the government has reinforced the regulations regarding spectrum and the design of communications policies, based on the creation of state agencies such as URSEC (2001) and DINATEL (2005). This institutionalization has strengthened the mechanisms for guaranteeing media independence. It has also generated initiatives for amending legislation on media ownership (to prevent concentration, promote diversified ownership, and address cross-ownership and the use of figureheads), and licensing conditions (to achieve a more democratic and accountable media system, instead of one based on favors in exchange for political loyalty); and increasing national contents that provide a public service.

The greatest advances in the legal sphere over the past five years are the Law on Community Broadcasting Service, the Decree-Law on Digital Terrestrial Television, and the bill on audiovisual communication services, which are seen as innovative and positive. The prospects for consumers to access a wide variety of voices and contents on DTT have been improved by the Decree-law on Digital Terrestrial Television.

Digitization poses a challenge to the public media: it demands a reversion to basic principles and a redefinition of the public service agenda, in the light of the scale and potential impact of new technology. MEC has presented innovative proposals to strengthen state radio broadcasting and generate synergies in the audiovisual and artistic environment. At the same time, ANTEL has played a key role in developing digital initiatives and defining technological options in telecoms.

Finally, civil society organizations have made breakthroughs in increasing the accountability of digital media through newly established committees, councils, and public hearings. This represents notable progress towards guaranteeing more democratic conditions for the media system. It now looks necessary to find a way of involving the whole population in these debates and in monitoring the media system.

8.1.2 Negative Developments

The new institutionalism, described above, constitutes a landmark in Uruguay's political history. Nevertheless, it has not yet proven capable of synthesizing the initiatives advanced by the diverse and opposed institutions and actors in the system. At the same time, it must not be forgotten that the political will to strengthen reform of the media system ultimately lies in the hands of the president, whose opinion on the subject has created much uncertainty and serious discussion in recent years. Fortunately, when the main lines of communication policy have been set, the president and state institutions have followed through with general changes in the national media landscape.

It is worth underlining the persistent disjunction between the state's forward-looking initiatives in the internet field on one hand—digital literacy, access, and inclusion, with a high degree of innovation, and the attainment of national consensuses, all combined in the CEIBAL Project—with the regulatory and political realities of the traditional media system, on the other hand.

Even as Uruguayans turn in increasing numbers to new communication and information technologies, with the CEIBAL Project as a conduit for democratic digital literacy among children and adolescents, national newscasts on free-to-air television are still the most popular daily news programs. Consequently, digital products only supplement the traditional sources of news.

Yet the country's weak regulatory system has turned the traditional media system into a commercially focussed model which lacks the spirit of public service and has been historically subject to the concentration of three large business groups. This has restricted the diversity of news, because Uruguay's television, radio, and printed press markets are largely controlled by those three groups.

The internet has done little to ensure a more diverse information agenda. Although digitization facilitates access to international media, most of the national information websites belong to large traditional (offline) media outlets, and offer little by way of original digital content. Not much progress has been made in creating pure-play digital media. Uruguay's growing connectivity has yet to generate, on any corresponding scale, digital spaces for communication.

More promising has been the development of certain digital initiatives via blogs and social networks, with new content-providers integrating their opinions and comments as part of the news. In the field of politics, candidates have resorted to social networks—chiefly Facebook and Twitter—to demonstrate their competence with the latest ICT.

In sum, the perceived impact of digitization differs when it is seen from a political, institutional, social, or technological perspective. What is clear is that the introduction of new technologies and platforms cannot remedy, by itself, the dearth of diverse media and plural content.

8.2   Media Tomorrow

Journalism has gained new tools for producing news and accessing a wider variety of sources, in a context where the speed of information delivery is at a premium and social networks play an increasing role in setting political and public agendas.

It is impossible to predict if or how the media will be able to adapt their business models to the digital environment. Where new actors enter the media environment, innovation and competition increase; the market predominance of Uruguay's three large groups in the digital era would certainly limit these benefits.

Planning for digital content creation on converged platforms has scarcely begun; in theory, this should open ways to explore new business models and grow local content production.

News provision will be strongly favored by the digital system as agents become aware of the profound impact of the internet on the younger generation, and of the potential of new formats. Luckily, the public has a strong appetite for news, so new ventures will be received with keen interest.

The CEIBAL Project has ensured a consistent, long-term state policy for digital literacy and inclusion, which also confers a new value on education. The project is expected to overcome its present weaknesses in the near future, relative to the capability and scope of use of the Xo computers for educational purposes, parallel to a retraining process for teachers who must put the new programs into practice. It is anticipated that this will democratize the applications of new ICT.

This is a period of historic changes in communications policy in Uruguay. However, the government has achieved no general political consensus among the different parties about the direction that policy should take. The enactment of the LSCA would represent a significant step toward reforming the entire media system.

List of Abbreviations, Figures, Tables, and Companies

Acronyms and Abbreviations

ACIJ	Civil Association for Equality and Justice (*Asociación Civil por la Igualdad y la Justicia*)
AGESIC	Agency for the Development of Electronic Government and the Information and Knowledge Society (*Agencia para el Desarrollo del Gobierno de Gestión Electrónica y la Sociedad de la Información y el Conocimiento*)
AMARC	World Association of Community Radio Broadcasters (*Asociación Mundial de Radios Comunitarias*)
ANDEBU	National Association of Broadcasters of Uruguay (*Asociación Nacional de Broadcasters del Uruguay*)
ANEP	National Public Education Authority (*Administración Nacional de Enseñanza Pública*)
ANII	National Agency for Research and Innovation (*Agencia Nacional de Investigación e Innovación*)
ANTEL	National Telecommunications Administration (*Administración Nacional de Telecomunicaciones*)
APU	Uruguayan Press Association (*Asociación de la Prensa Uruguaya*)
ASOPROD	Association of Uruguayan Cinema Producers and Film-makers (*Asociación de Productores y Realizadores de Cine del Uruguay*)
AUDAP	Uruguayan Association of Advertising Agencies (*Asociación Uruguaya de Agencias de Publicidad*)
CAINFO	Center for Archives and Access to Public Information (*Centro de Archivos y Acceso a la Información Pública*)
CARDALES Plan	Convergence Plan for Access to Recreation and Development of Employment Alternatives and Sustainable Enterprises (*Plan de Convergencia para el Acceso a la Recreación y al Desarrollo de Alternativas Laborales y Emprendimientos Sustentables*)
CCA	Audiovisual Communication Council (*Consejo de Comunicación Audiovisual*)
CEIBAL Project	Educational Connectivity Programme on Basic Computer Skills for Online Learning (*Plan de Conectividad Educativa de Informática Básica para el Aprendizaje en Línea*)

CHAI	Independent Consulting Honorary Committee (*Comisión Honoraria Asesora Independiente*)
CHARC	Honorary Advisory Committee for Community Radio (*Consejo Honorario Asesor de Radios Comunitarias*)
CHASCA	Honorary Consulting Commission on Audiovisual Communication Services (*Comisión Honoraria Asesora de Servicios de Comunicación Audiovisual*)
CIDH	Inter-American Commission on Human Rights (*Comisión Interamericana de Derechos Humanos*)
CUTA	Uruguayan Chamber for Pay-TV (*Cámara Uruguaya de Televisión para Abonados*)
DICREA	Creative Industries Department (*Departamento de Industrias Creativas*)
DINARA	National Water Resources Agency (*Dirección Nacional de Recursos Acuáticos*)
DINATEL	National Telecommunications Office (*Dirección Nacional de Telecomunicaciones*)
DTT	digital terrestrial television
ECH	National Household Survey (*Encuesta Continua de Hogares*)
FESUR	Friedrich Ebert Foundation in Uruguay
FEUU	Federation of University Students of Uruguay (*Federación de Estudiantes Universitarios en Uruguay*)
FUCVAM	Federation of Mutual Aid Housing Cooperatives (*Federación Uruguaya de Cooperativas de Vivienda por Ayuda Mutua*)
GMS	Media and Society Group (*Grupo Medios y Sociedad*)
IAB	Interactive Advertising Bureau Uruguay (*Bureau Uruguayo de Publicidad Interactiva*)
IBOPE	Brazilian Institute of Public Opinion and Statistics (*Instituto Brasileño de Opinión Pública y Estadística*)
ICAU	Film and Audiovisual Institute of Uruguay (*Instituto del Cine y Audiovisual del Uruguay*)
ICT	information and communication technology
IMUR	Uruguayan Marketing Institute (*Instituto de Marketing del Uruguay*)
INDDHH	National Institute of Human Rights and Ombudsman Office (*Institución Nacional de Derechos Humanos y Defensoría del Pueblo*)
INE	National Statistics Institute (*Instituto Nacional de Estadísticas*)
IPC	Consumer Price Index (*Indice de Precios al Consumidor*)
IPYS	Press and Society Institute (*Instituto Prensa y Sociedad*)
ITU	International Telecommunication Union
LATU	Technological Laboratory of Uruguay (*Laboratorio Tecnológico del Uruguay*)
MEC	Ministry of Education and Culture (*Ministerio de Educación y Cultura*)
MI	Ministry of Internal Affairs (*Ministerio del Interior*)
MIEM	Ministry of Industry, Energy, and Mining (*Ministerio de Industria, Energía y Minería*)
MIT	Massachusetts Institute of Technology
MSG	Media and Society Group (*Grupo Medios y Sociedad*)
OAS	Organization of American States
OPI	Press Organization of the Provinces (*Organización de la Prensa del Interior*)
OSILAC	Observatory on the Information Society in Latin America and the Caribbean (*Observatorio para la Sociedad de la Información en América Latina y el Caribe*)

PIT-CNT	Federation of Trade Unions and National Workers' Convention (*Plenario Intersindical de Trabajadores, y Convención Nacional Trabajadores*)
PLEMUU	Convention of Women in Uruguay (*Plenario de mujeres del Uruguay*)
RAMI	Association of Radio Stations in the Provinces (*Asociación de Radios del Interior*)
RapCEIBAL	Support Network for the CEIBAL Project (*Red de Apoyo al Plan CEIBAL*)
RUTSA	Uruguayan Transmission Network (*Red Uruguaya de Trasmisión*)
SCAN	National Audiovisual Communication Services (*Servicio de Comunicación Audiovisual Nacional*)
SERPAJ	Peace and Justice Service of Uruguay (*Servicio Paz y Justicia del Uruguay*)
SNT	National Television System (*Sistema Nacional de Televisión*)
SODRE	Official Broadcast, Radio, Television, and Entertainment Services (*Servicio Oficial de Difusión, Radiotelevisión y Espectáculos*)
SUA	Actors' Trade Union (*Sindicato Único de Actores*)
TCC	Technical Consulting Committee (*Comité Técnico Consultivo*)
TCC	Televisión cable color
TNU	National Television of Uruguay (*Televisión Nacional del Uruguay*)
UAIP	Unit of Access to Public Information (*Unidad de Acceso a la Información Pública*)
UDELAR	University of the Republic (*Universidad de la República*)
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
URSEC	Unit Regulating Communications Services (*Unidad Reguladora de Servicios de Comunicación*)

Figures

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24. Bosnia and Herzegovina
25. Poland
26. Montenegro
27. Georgia
28. Nigeria
29. Colombia
30. Croatia
31. Slovenia
32. China
33. Peru
34. Chile
35. Spain
36. Kenya
37. Bulgaria
38. India
39. France
40. Estonia
41. Kazakhstan
42. Malaysia
43. Pakistan
44. Slovakia
45. Czech Republic
46. Egypt
47. Singapore
48. Brazil
49. Armenia
50. Jordan

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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