

Colombia - Media Landscape

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Overview

Media play a prevailing role in the daily life of the average citizen of Colombia. At the beginning of the last century the habitual consumption was of national and regional traditional printed newspapers; as of today the consumption of electronic media (television and radio) in digital form either from mobile phones, computers or tablets has become the norm. Currently, television is the most consumed media with a penetration rate of 91 percent, used by 85 percent of all Colombian citizens. Nevertheless, radio continues being important with a 79 percent consumption level, followed by the press. Third comes the Internet, which has been gaining ground and thanks to the convergence of other media, it is common to observe today that the main newspapers, television and radio are consumed online.

In the recent history of the country, several circumstances/forces have played a decisive role in the media, directly affecting the freedom of expression and professional practice of journalism. Political violence emerged in the first half of the 20th century and polarised the country between two major parties, which further developed violence processes throughout the country and gave origin to insurgency processes that ended in the creation of different groups outside the law, turning Colombia into the Latin American country with the oldest guerrilla. The political violence and the presence of armed groups gave way to the violence of drug trafficking and the emergence of different drug cartels with disastrous and profound effects at a political, economic and social level. In the middle of both processes, paramilitary groups emerged, armies outside the law financed by landowners and politicians who tried to impose justice by their own hands without State control.

News media in Colombia demonstrate these forces and how they were installed in the exercise of journalism, affecting substantially the freedom of the press and the right of the citizen to be well informed. Historically speaking, since the emergence of partisan media, which took positions on national facts based on the ideological doctrine they served, media and journalists became the military target of guerrilla groups, drug cartels, paramilitary groups and corrupt officials of the State that were aligned with some of these outlaw groups. The recent history of journalism is full of unprecedented attacks to the media with high explosives, murders of journalists, collective kidnappings, intimidation and threats; but also, the payment of bribes and funding of journalistic programmes that direct their editorial positions to the benefit of the interests of these groups.

Many journalists went into exile or left journalism as they received direct threats from the guerrillas or some drug cartel, paramilitary group or any corrupt official allied to these criminal groups. During the 1980s and 1990s, Colombia was considered one of the most dangerous countries in the world for a journalist to practice the profession. Although the main guerrilla group (FARC-EP) entered a peace process with the government in 2016, there are still several Non International Armed Conflicts in Colombia, two of them related to other guerrilla movements such as the *Ejército de Liberación Nacional* (National Liberation Army - ELN) and dissidents of the *Ejército Popular de Liberación* (Popular Liberation Army - EPL) and

different criminal organisations such as the *Autodefensas Gaitanistas de Colombia* (Gaitanista Self-Defense Forces of Colombia - AGC), called the Gulf Clan by the government, all of which affect freedom of the press. Since the demobilisation of the FARC there have been armed confrontations between ELN and EPL and the AGC in order to gain control over cocaine-producing areas. The work of journalists in such areas is particularly difficult and risky. More than often self-censorship is the norm for most of them in order to survive. In 2018 three Ecuadorian journalists were killed by Gaucho, a former member of FARC-EP, while doing their job along the Colombian frontier, showing the hard circumstances in which journalists have to work in Colombia.

The media landscape is structured by a dynamic ecosystem in which diverse sources of information compete for the market, where the average Colombian consumes 4 hours of media content daily. While television has the greatest penetration and consumption at a national level, radio is the prevalent market segment mainly at a rural level and newspapers enjoy the greatest credibility in terms of information content. As it is happening in other places of the world, print media are facing the emerging crisis brought by free online media, with a drastic reduction of circulation in national and local contexts. In some cases the most important media enterprises have reduced their print circulation up to 35 percent. Besides, 2 of the 10 newspapers with the largest circulation (*ADN* and *Publimetro*) are circulated for free (a relatively recent phenomenon in the country).

However, print media have resorted to many strategies in order to ensure their survival in the market. Thus, 5 of the 10 newspapers of major circulation are in tabloid format and have a distinctly yellow focus (*Q'hubo* from Medellín, Cali, Bogotá and Cartagena and *Al día* from Barranquilla). Both *Q'hubo* and *Al Día* belong to traditional publishing houses that own well-known regional media. Nonetheless, they have turned to the publication of types characterised by screaming headlines and information on judicial issues at the local level, which have attracted high audiences in a short time, mainly in popular sectors. The *Extra* newspapers, with similar content, have a presence in almost all capital cities and other municipalities with high population. It remains remarkable that half of the newspapers with the largest circulation in Colombia are sensationalist and do not offer neither texts in the major genres of journalism (reports, chronicles) and in-depth articles, nor do they have opinion columns that present analysis of facts. Also, international news is very scarce in these formats.

These media belong to private initiatives that use advertising and subscriptions as their main sources of income. The most important ones belong to large economic conglomerates of the country, some of them also owners of electronic and print media. In this respect, at a television level, the private channel *Caracol* has the highest news audience followed by the private channel *RCN*. For radio, the radio station *Blue Radio*, a subsidiary of *Caracol* television, has the greatest penetration. Both belong to the Santo Domingo family. The second most listened station is *La W*, which belongs to the Spanish group Prisa. Speaking of newspapers, *El Tiempo* has the highest national circulation followed by *ADN*, which is from the same publishing house, owned by Luis Carlos Sarmiento Angulo.

The emergence of print media in the 19th century was strongly related to political parties. Somehow, print media was considered a space for political and intellectual leaders to express their position from a perspective very much aligned to their partisan vision on facts of the current national context. In this sense, from 1886 to 1994, 22 of 28 Colombia presidents were previously media directors, columnists, or newspaper owners (Herran 1991). In different departments of Colombia, the main newspapers had a clear partisan affiliation and it was very common that their owners had important political positions at the local or regional government level. Regarding news media, the main political families of the country were the owners of any television newscast, national print media or publication of great national relevance.

Even though partisan journalism is still present, fundamentally at the regional level, a new dynamic has been gaining ground in the national media landscape. Currently, the principal media of the country belong to large economic conglomerates that have many interests at the commercial, banking and business levels. Hence, newspaper *El Tiempo*, ranking first for national

circulation, belongs to Luis Carlos Sarmiento Angulo, owner of the Grupo Aval, part of the largest banking system in the country. Besides, he is one of the remarkable constructors with many road tenders in the country. On the other hand, the private channel *RCN*, as well as the *National Radio Network RCN* belong to the magnate Carlos Ardila Lülle. The most important private television channel *Caracol* belongs to Alejandro Santo Domingo, who also owns *El Espectador*, the second national newspaper for circulation in Colombia.

While the privatisation of television and the gradual commercialisation of news media has greatly reduced partisan journalism, it is not possible to affirm that this no longer exists. If the owners of these media conglomerates align their interests with any leader in charge, it is very probable that editorial policies will be influenced by this pressure. Such is the case of *RCN*, which has been highly criticised for having a very favorable approach to the policy of President Alvaro Uribe during his term (2002-2010). Multiple complaints were heard from independent sectors of the always favorable image and lack of criticism of government actions, which were evident in the news of the second most important private channel and the national radio network *RCN*. Consequently, media concentration through conglomerates and political parallelism are mixed in a highly harmful combination for media independence and freedom of expression.

Since its inception, journalism has been highly valued in Colombia. Great personalities of letters, including writers, intellectuals and statesmen, were highly respected and gave great prestige to the journalistic exercise. The famous phrase of Nobel laureate Gabriel García Márquez who affirmed that "journalism is the best job in the world" is frequently quoted in Colombia. Yet, this romantic and ideal perspective conceived the writing exercise as related to the literary or opinion journalism, pertaining to the intellectual and/or political elite. The reporting work that involves hard fieldwork was sometimes absent from such considerations.

Undoubtedly, there was a distance between intellectuals, statesmen and journalists who at the time worked as reporters in the newsroom of various print, radio and television media. The average journalist had either empirical skills (having learned the job in the news room without formal studies) or may have studied some liberal profession such as law and be reporting out of a passion to inform. At the time there was no clear path or formal training processes to start writing in media, and thus, to gradually develop the professional exercise of journalism.

In the 1970s, the first university programmes of Social Communication/Journalism began and were gradually positioned in the national context. These programmes arose from the need to professionalise journalists, providing them a humanistic, theoretical and practical training that would allow them to exercise with quality. Over the years, it was increasingly common that people who worked in the media, had to be professionals and graduated from these faculties. Recent studies estimate that 77.6 percent of active journalists in the country have a Bachelor's degree and 23 percent are specialised in journalism (Arroyave & Garces, 2016).

When the career was consolidated and had graduate journalists, the practice of journalism was regulated by the issuing of a professional card. However, this condition was questioned because it was argued that it affected freedom of expression. The card was abolished and today it is not considered a requirement to exercise journalism in the country. The Constitutional Court concluded that demanding a professional card for the practice of journalism is a violation of freedom of information (Unconstitutionality of Law 71 of 1975 - Judgment C 087 of 1998).

Nowadays, journalism is considered as a respected profession, although it is surrounded by several problems, particularly in those contexts that are not part of the main cities. On the one hand, a large number of journalists do not have direct work contracts with the media. Their payments are taken from the advertising quota, by allocating the revenues generated during a certain advertising space to pay the salary of journalists. But the companies that pay for this pattern expect some form of retribution from the journalists, which usually affects their professional independence. Besides, some studies demonstrate the

lack of job stability and precarious salaries which affect the profession development (Gutierrez et al, 2010). In 2019, some 400 journalists lost their jobs. Some of the major news channels are shrinking their newsrooms due to the economic crisis caused by a shortage of advertising revenue, which largely shifted from traditional news media to the internet (Google and Facebook). RCN News has fired 100 journalists in the past three years, especially regional correspondents. Some 1,100 media workers have lost their jobs in the past four years. According to FLIP (2019), this uncertainty among journalists is a setback that affects freedom of expression.

The State has played a preponderant role in the media system, not only as owner of the electromagnetic system, authoriser of operating licenses and leader of public policy for its regulation, but also in different types of incidents that have even been denounced by labour unions of journalists and foundations that defend freedom of expression in the country. Indeed, concerning the state's role of authorising licenses, several studies show that those media critical of the government have not had their license renewed, with no official justification. In addition, there has been direct pressure against media reports, ending at times in the dismissal of journalists. Recently, the Foundation for Freedom of the Press has documented the cases of more than ten foreign journalists on whom the Colombian government imposes illegitimate restrictions, such as requiring a university diploma in journalism to guarantee a visa in the country. As FLIP mentioned such a request goes against the Constitution, since having a diploma in journalism is not a requirement to work as a journalist. Another example of state intervention is the case of the *Community of the Ring*, a phenomenon of corruption in the military forces denounced by the journalist Vicky Dávila, which ended in her firing from the newsroom, even though she was one of the journalists with the largest audience at that time.

In the annual report of the Foundation for Press Freedom (FLIP, 2019), it is stated that, "In the midst of this battle of blood and firearms by outlaw structures, the press has been cornered in the confrontation. This has been reflected in the increase in the number of violent actions against journalists and in the consolidation of prohibited zones for journalistic coverage, which contributes to the deepening of self-censorship" (p.9). In 2019, the Foundation documented 515 attacks against the press in Colombia, of which 137 were threats, 4 were kidnappings and 2 were homicides. In departments such as Arauca and Nariño there was an increase in violence against the press of 300 percent and 62.5 percent respectively in the last two years. In Valle del Cauca there was an increase of 60% only in the last year.

In the regions of Colombia, where journalists have been intimidated or have witnessed violence against their colleagues, self-censorship becomes an alternative for survival. During the national protests on November 21, 56 abuses were registered, affecting 66 journalists, of which 35 were perpetrated by the public forces, 22 by unknown agents, 8 by private agents and 1 by a public official. This edition of the report also includes a section on impunity for crimes committed against journalists. Between 1977 and 2019 there have been 159 murders of journalists in Colombia, in 1 case the entire criminal chain was sentenced, in 4 cases those who actually ordered the crime, in 29 cases the material authors, and there are 125 cases with total impunity, which corresponds to 78.61 percent.

One alarming issue in the country is the use of the official advertising guideline that directly affects freedom of expression and distorts the role of creating a public sphere that understands the issues that affect citizens. In a recent national survey with active journalists carried out by the Antonio Nariño project, 62 percent said they knew journalists who modified their editorial position in exchange for advertising or political favors. For their part, 40 percent of national journalists said that there has been an improper governmental editorial control in the public media at departmental level, and 38 percent at national media level during 2017.

According to a recent study, while the internet audience grew 252% in the last decade, print newspapers lost around 28% of their audience in Colombia. For instances, the two most important national newspapers, El Tiempo and El Espectador, reduced their audience by 34% and 33 % of non-digital users respectively. However, Semana, the news magazine, increased

its audience by 15% in the same period. The television audience grew slightly from 15.6 million in 2010 to 16.6 million in 2019, representing an increase of 6,07%, although it is now consumed on new platforms such as mobile phones, tablets and computers. Regarding the radio audience, there were mixed results, with an increase in audience on FM stations of 4.8% and a decrease in the audience on AM stations of 12%, in the last ten years (Mariño, 2019).

Media

Print

Print media with national and regional circulation have traditionally been those of superior influence and credibility in the country and those that usually establish the information agenda. The pioneering newspapers belonged to well-known families that had a clear political affiliation and were inherited by their successors. The two oldest newspapers with the largest circulation, *El Tiempo* and *El Espectador*, arise in this way. *El Tiempo*, for instance, was born as an initiative to support the thoughts, ideas and government of Republicans, in 1911. *El Espectador*, founded in 1887, was born as a newspaper advocating liberalism in the country. The regional newspaper *El Heraldo*, owner of *Al Día*, was created in 1933, as a liberal source to support the candidacy of Alberto López Pumarejo. Other regional newspapers followed this trend and it was very common to find that main publications were related to families with an important political and economic influence in the region.

Nowadays, many of the print media belong to large economic conglomerates, which are also owners of well-known national companies. Indeed, there has been a significant change in the logic of administering media companies. Traditionally, these companies were passed through inheritance within families with recognised prestige and clearly established political roles. Nowadays media companies are considered part of the business chain, mainly under a commercial perspective, although with interests often interfering in the professional exercise of informing the audience objectively and impartially.

According to the Cultural Consumption Survey lead biannually by the National Department of Statistics (DANE in Spanish), in 2017, 55 percent of the population over 12 years of age read newspapers. This was a decrease of 1.7 percent with respect to the rates obtained in 2016, and 12.1 percent regarding the results from the survey in 2014. The population group that mostly reads newspapers is that of people between 26 and 40 years of age at 61.3 percent, followed by the segment from 41 to 64 years with 60.6 percent. By age group, those who read least are people between 12 to 25 years with 43.9 percent followed by the segment of over 65 with 53.3 percent. With regard to the frequency of reading newspapers, 27.4 percent did it once a week, 37.7 percent did it several times a week and 21.5 percent did it daily. Around 17.7 percent said to read the newspaper in digital format.

Regarding the educational level of the newspaper-reading population, it is relevant to note that the group with the highest level is the one that consumes less printed media. As the survey shows, just 9.3 percent of the population with university-level education or higher read newspapers, while the population that mostly reads newspapers has a secondary education level with 25.32 percent, followed by the segment combining people with preschool or basic primary education with 14.27 percent.

This high consumption of print media by the less educated population is explained by the fact that 5 of the 10 newspapers with the largest circulation are characterised by light content, short texts, lots of graphic information where local topics predominate along with judicial facts. However, it is also important to highlight that people living in rural areas tend to

consume radio and TV products instead of printed media. A huge percentage of the population who enjoy local news and local references finds such information on local, regional and community radio stations.

These are the most widely read print media in Colombia, according to the General Media Study (2016):

- *El Tiempo*
- *ADN Bogotá*
- *Q'hubo Medellín*
- *Al Día Barranquilla*
- *Publimetro*
- *Q'hubo Cali*
- *Q'hubo Bogotá*
- *El Espectador*
- *Q'hubo Cartagena*
- *El Colombiano*

Q'hubo newspapers, which circulate in Medellín, Cali, Bogotá and Cartagena, as well as *Al Día*, are characterised by their sensationalist and yellow focus, with subjects based on judicial issues of their localities, sports and entertainment. In addition, the publications *ADN* and *Publimetro* are free and circulate in Bogotá, highlighting information about the context of the capital. On the other hand, the newspapers *El Tiempo* and *El Espectador*, despite having national coverage, have their centre of action in Bogotá and publish information that gravitates around issues of the capital.

A first conclusion that arises is that half of the 10 most widely circulated print media are concentrated in Bogotá. There is some centralisation of information that favours the capital of the country in lighter content media and more formal content media. Also, it is observed that the average Colombian prefers a local/regional information to a wide national/international one, which is presented in all media with popular and sensationalist focus or in newsletters with free circulation.

The newspapers with the largest national circulation are related to the following companies:

- *El Tiempo* (National), the most widely read newspaper in the country is owned by Casa Editorial El Tiempo, which also manages ADN. Its owner is the businessman Luis Carlos Sarmiento Angulo;
- *Q'hubo* (Local) belongs to the company Grupo Nacional de Medios and its majority shareholder is El Colombiano also listed among the 10 most important newspapers in the country, and is managed by Gomez & Hernandez Families, Lloreda Family and Galvis Family, media entrepreneurs in a regional level;
- *Al Día* (Local) belongs to El Heraldo, owned by the Manotas, Pumarejo and Fernández Families;
- *Publimetro* (Local) belongs to Metro Internacional | Publimetro Colombia;
- *El Espectador* belongs to Caracol TV/El Espectador Comunican and its owner is the businessman Alejandro Santo Domingo;

· *El Colombiano*, largest shareholder of *Q'hubo*, belongs to the Gómez and Hernández Families.

On the other hand, according to a study done by *Cifras y Conceptos* (Figures and Concepts) in 2019 the print media most used among nationwide opinion leaders to keep up with current issues were the following: *El Tiempo* by 18 percent of opinion leaders nationwide, *Semana* by 16 percent, *La Silla Vacía* 15 percent, *El Espectador* 13 percent, *Las 2 Orillas* 6 percent, *Portafolio* 3 percent, *El País de España* 3 percent, *Razón Pública* 3 percent, *El País Cali* 3 percent, *Kienyke* 2 percent, *El Colombiano* 2 percent, *Pulzo* 1 percent, *La República* 1 percent, *The New York Times* 1 percent, *Dinero* 1 percent, *Verdad Abierta* 1 percent, *La Cola de Rata* 1 percent.

By expanding the number of newspapers that have the greatest circulation at the national level, it is observed that the regional press predominates, where the principal media are concentrated in urban areas or in the administrative capitals of the country. Minorities such as the indigenous communities of Colombia do not have fair representation in the media. The responsible of disseminating information in the print form and digital newsletter are the National Indigenous Organisation of Colombia (ONIC in Spanish), the Emberá and Wounaan Regional Organisation (OREWA in Spanish), which have a little scope and do not go beyond the indigenous contexts. There is also the magazine *Actualidad Étnica* that covers Afro, indigenous, Sinti and Roma communities. However, this magazine only comes by subscription and is sold in the capital of the country, which does not make it precisely accessible to all minorities. It is also worth mentioning that there are some newspapers that have sections focused on issues of conflict, violence and human rights. For example *Colombia2020* (*El Espectador*, funded by the EU), *El Colombiano* (Medellin), and *Diario del Huila*.

The peace agreement recently signed by the national government enhances the enormous challenge of integrating the FARC into the information landscape of Colombian media. Part of the agreement includes the possibility that this new political group, now called *Fuerza Alternativa Revolucionaria del Común* (Revolutionary Alternative Force of the Common), might participate actively in civil life and expose its proposals of government to society. This fact has vital importance, if it is considered that, back in the 1980s, the previous attempt of the group to form a political party called *Unión Patriótica* (Patriotic Union) with the majority of its members joining civil society and beginning to do politics, ended in their murder causing the extermination of this movement.

Radio

Radio has been one of the most popular media in Colombia. According to the Ministry of Technology of Information and Communication, radio is the media with the highest reach, with 48.3 million of Colombians or 79.94 percent of the national population that use it, the second most consumed media after television.

Colombia has three major national radio networks: State-run *Radiodifusora Nacional de Colombia* and private networks *Caracol Radio* and *RCN Radio*, with hundreds of affiliates. These networks appeared in the 1940s. There are other national networks, including *Cadena Super*, *Todelar*, *Organización Radial Olímpica* and *Colmundo* among others.

There are 1,596 radio stations divided into AM and FM frequencies (1,243 stations allocated in FM and 353 in AM). Of those radio stations, 667 are commercial enterprises, 626 are community radio stations and 303 are affiliated to the State and broadcast educational and cultural contents and the promotion of constitutional rights.

Mostly, radios transmit musical programming, classified many times by different tendencies such as tropical, ballads, vallenatos and urban music (reggaeton). Newscasts, magazines, sports programmes and political content are also common in these contexts. Christian radios affiliated with different religious organisations have also emerged. Some of them transmit music of different genres, although the lyrics are exclusively religious: A relatively new phenomenon in the country.

The audience measurement of the radio business is guided by the ECAR (Continuous Study of Radial Audiences). The most powerful in that list are the Prisa Group, which through *Caracol Radio*, in 2017 invoiced COL\$179.4m (US\$64m), followed by *RCN Radio* COL\$168.3m (US\$60m) and *Organización Radial Olímpica* COL\$90.7m (US\$32.4m).

In terms of audience share, private networks hold the largest audience. In the 2019 audience study conducted by ECAR, the Olímpica Stereo radio network owned by the Char family's Olímpica Radio Organization was the most listened to in all cities, except in Cali, where it was only surpassed by Tropicana Stereo of the Caracol Radio network. According to this same survey, 76% of the radio in Colombia is musical and only 24% is spoken.

According to the National Administrative Department of Statistics (DANE), 76.94 percent of people over 12 years old listen to radio, and in terms of audience by sex, the data shows a slightly higher participation of women compared to men in its respective share. In addition, 62.29 percent of the same sample has always listened to radio, 17.90 percent did it almost every day of the week and 14.84 percent several times a week. However, the highest percentage of daily listening is for the age group between 41 and 64 years old with 24.56 percent. Regionally, radio ranks second in all consumer trends after television. This entity also found that 69.9 percent of Colombians listen to digital radio.

Regarding the influence of radio in the electoral field, a survey carried out by .co Internet in alliance with the National Consulting Center (CNC) showed that, during the time of the 2018 presidential elections in Colombia, 37 percent of the population was informed about the development of the electoral contest through radio stations, positioning radio as the third most consulted media by Colombians, after social networks and digital media.

Moreover, several stations are led by minorities such as indigenous communities, where one of their most important missions is to promote the systematisation and dissemination of resources for the strategic use of ICTs (Information and Communication Technologies). Similarly, indigenous stations work to increase the visibility of the specific community in the region and to foster a sense of value of their culture among the same groups. Some of them are *Namui Wam Estéreo*, *Radio Nasa Tierradentro*, *Radio Payumat* and so on. Another initiative in favor of people with disabilities is the highly respected *INCI Radio*, which is the virtual station of the National Institute for the Blind, dedicated especially to issues of visual disability in the country.

An important reference in the use of media by indigenous movements is the Regional Indigenous Council of Cauca (CRIC in Spanish), which has a substantial role in strengthening the Association of Indigenous Media of Colombia (AMCIC Network). According to Otero (2008, p 11), this organisation was "created at the end of the 1990s in order to reinforce communication collectives, especially the indigenous radio project which promotes the diffusion of local identities, their concepts of life and the coexistence; assuming cultural diversity as the most important wealth of Cauca and Colombia." Another important network is the National System of Indigenous Information and Communication (SICO in Spanish), guided by the National Indigenous Colombian Organisation (ONIC in Spanish).

Among the Public Interest Radio Broadcasting system the Military Forces, the Army and the Police have their own radio stations with huge coverage, particularly in rural areas. These institutional radio stations "have the purpose of satisfying the communication needs of the State with its citizens and communities in the geographic area covered for the purpose of contributing to the strengthening of the nation's cultural and natural heritage." While the programming of these radio stations is tailored to the specific regions that they cover, they also help to share messages with strategic purpose.

For instance, Maldonado (2017) stated that Military radio stations were instrumental in leading members of the FARC to quit the guerrilla movement. In his report, Commander Aldinever Morantes, a FARC leader, acknowledged that "the psychological action of the military radio station poisoned many people. They invited the peasants to become "toads", or informants, to

infiltrate popular organisations and the guerrillas themselves. That caused a problem for us. And that problem ended in what? In the dead, the wounded, the disappeared and incarcerated.” At the same time, Clandestine FARC radio stations were persecuted and destroyed. Some local and community radios were gradually disappearing because of the government's requirements to function. In a couple of years the Army created 33 radio stations nationwide and several portable radio stations. As Maldonado concluded “radio became a weapon and radio stations a military target.”

The project called Information Cartographies, led by FLIP, aimed to map the municipalities of Colombia where there is any kind of censorship as a consequence of the armed conflict. In a progress report, FLIP reported that out of 994 visited municipalities, 578 corresponded to what they called “Zones of Silence”, that is, places where there was no media that produced local news. In a large part of rural Colombia, the main means of communication is radio, particularly community radio that fulfills the function of disseminating local information, although many times in precarious conditions.

Currently, radio faces a very important challenge in Colombia: The inclusion of new voices as part of the peace agreement signed between the government and the FARC guerrilla. The objective of these stations, which will have a community nature, would be to establish and disseminate a pedagogy of the post agreement era in remote regions far from urban centers, aimed at creating a balance of opinions about different public affairs issues, generating spaces for inclusion of non-official voices and strengthening communication in rural areas of the national territory.

Television

With an average consumption of 240 minutes per day, television is the favorite media channel for Colombians. In terms of diffusion, 91 percent of families have at least one TV and the public signal reaches 92 percent of the Colombian territory. Two private channels (*Caracol* and *RCN*) dispute the popularity with 80 percent of the national audience. Nevertheless, since 2008, there have been different attempts to implement a third channel by different private enterprises to increase pluralism, but laws guaranteeing free competition have not allowed for it to be established. The Communications Regulation Commission is in charge of the telecommunications, television and postal services market in the country.

During 1954, TV was introduced in Colombia by General Gustavo Rojas Pinilla and had an audience and educational focus. The first educational programmes were recorded and transmitted in 1954 and sought to reduce illiteracy. However, this first programme, which was based on a German model of education, was soon cancelled and resumed in 1961. The telecentres were established, rooms where communities received classes from first to fifth grade. In 1955, the *TVC* or *Commercial Television Company* was launched with the support of radio partners *RCN* and *Caracol*.

In 1970, the Minister of Education, through the Popular Progress Training project, taught social classes on Channel 11, which today is *Señal Colombia*. Several educational programmes were very popular in the country, among them *Natularia*, *Professor Yarumo* and *Francisco the Mathematician*, which have framed the effort to use this source with social purposes. In this attempt, a notable example is the series *Banderas en Marte* (Flags on Mars), a co-production between *Señal Colombia* channel, the National University and the District Education Secretariat. It is a documentary magazine that seeks to promote civic participation among young people from marginal neighborhoods. The series was not only selected by UNESCO as one of the best programmes for young people at the time, it also received the Maeda Prize of Japan in 2006.

There are five national channels, two private channels (*RCN* and *Caracol*) and three public ones administered by the State and financed by a special fund system: *Señal Colombia*, *Canal Institucional* and *Canal Uno*. Regionally there are eight public channels and locally 43 operators, of which 42 non-profits and the *City TV* channel which is for profit. In addition, roughly 12 religious channels integrate the television offer at national and departmental level. Some of them are: *Cristovision*, *Sonríe TV*, *Nosotros TV*, *Gospel Planet* and *Oasis TV*.

According to the General Media Study of 2017 the most watched channels in Colombia are *Caracol*, *RCN*, *TNT*, *City TV*, *Fox*, *Win Sports*, *Disney Channel*, *Cartoon Network*, *Discovery Channel* and *Fox Sports*. Besides, and according to the latest rating study, the most watched programmes are: *La venganza de Analía*, *Amor sincero*, *Noticias Caracol (7pm)*, *Tres Milagros*, *El General Naranjo*, *Diomedes el Cacique de La Junta*, *Omer*, *Lazos de sangre* and *Corazón indomable*. Prime time reality shows and soap operas are the programmes with greater reach in Colombian television, but because of Covid-19 the programs broadcast are pre-recorded productions and repetitions of successful novels. Due to the norms of social distancing, it has not been possible to record reality shows or new novels. National productions prevail in prime time schedule, but Turkish, Mexican and Brazilian soap operas are also transmitted and have a certain popularity with the audience during afternoons.

In 2016, a General Media Study revealed that young people aged between 12 and 25 years are those who watch more television, since 93.9 percent of them said they use this source. In contrast, the elderly are those who consume the least, with 88.3 percent of viewers.

Colombia is working on the implementation of digital television for all, in an attempt to promote competition, efficiency, effectiveness, flexibility and innovation. Some proposals point out to the use of traditional media such as the digital terrestrial television network. To date, the National Television Authority (ANTV) has launched 3 of the 5 phases of digitalisation planned for Colombia. By 2019, national and regional public channels had a significant increase in audience. The public channels had a 22% growth since 2015 and the regional channels had a 11.4% growth since 2014.

Regarding inclusive television, resolution number 350 by the ANTV legalises the use of access systems for people with disabilities: Closed Caption, subtitling and sign language in Spanish (the official language of the country) are the implemented systems. For the viewer, it is easy to identify these systems, because they are displayed as a box on the screen, where a professional appears and translates by gestures what is being transmitted or letters show in the lower part of the screen. In addition *Con Voz* (With Voice), especially made for the deaf population and available on all platforms, was one of the most watched soap operas on public television in the country (during the time it was on air).

Given that Colombia's main conflict is over, television has the mission of creating an audiovisual narrative prepared from the perspective of victims, because the focus has always been on official versions or those from the perpetrator. The fact of including the point of view of those who lived through the conflict is supposed to create the historical memory of war. The idea for public television is to have a leading role in telling these stories and, at the same time, show the causes of the conflict.

Regional channels are operated from a specific area of the country for the population of those localities. Nevertheless, subscription or digital terrestrial television is required to have access from a different place from that specific region. Some examples of this type of channels are *Teleantioquia*, which transmits from Medellín and has 2,721,400 viewers of which 163,900 are new viewers. Currently, the rating is 0.20 considering that the highest national score is 13.5. *Telecaribe* broadcasts from Barranquilla and its main audience is wireless homes at the regional level; at national level, it is among the 10 most watched public channels, and has a rating of 0.18. *Telecafé* transmits from Caldas, Quindío and Risaralda primarily with a rating of 0.05. *Telepacífico* has a score of 0.20, it broadcasts from Cali to Valle del Cauca and Chocó and it has different contents, but it is mostly dedicated to a family audience. *Canal 13* broadcasts to Bogotá, Cundinamarca, Huila, Tolima and others, has a rating of 0.14 and is focused on a youth audience. Lastly, *Canal TRO*, or *Canal de Televisión Regional del Oriente*, which transmits for Santander and Norte de Santander, has a reach of 0.05.

Digital Media

By 2020, the [Min Shum](#) study on the digital, internet and social media situation in Colombia records a penetration of 69

percent, compared to 62.3 percent in 2017. This report shows that Colombians spend approximately 9 hours and 10 minutes surfing the Internet per day, of which they spend 3 hours and 45 minutes on social networks, 3 hours and 30 minutes consuming online content, 1 hour and 24 minutes listening to music on streaming services and 53 minutes playing video games.

According to the Alexa's ranking, a company of amazon.com, the most visited pages in Colombia are Google, YouTube, Pulzo, Google again but with .co, Live (Microsoft e-mail service), Facebook, Zoom, Las2orillas, MercadoLibre and Wikipedia. Zoom has been an essential tool for Colombians in times of social alienation, and news sites such as Pulzo and Las2Orillas have joined the list.

The 10 most read newspapers in Colombia also have their digital version. *El Tiempo*, *Publimetro*, *El Colombiano* and *El Espectador* are focused on the web page format from which they constantly provide updated information and manage social networks. However, some of these publications such as *Semana*, *El Espectador* and *El Tiempo* are starting to limit access to online articles and column, forcing interested readers to pay a subscription. The quality of these digital media has improved a lot, leading media such as *El Tiempo* and *Semana* to win several national and international awards.

Local newspapers such as *Q'hubo*, *Al Día* and *ADN*, on the other hand, only show digital versions of the print one in PDF format. A study by Said-Hung, Arcila-Calderón and Méndez-Barraza states that around 90 percent of the media that do not have a digital version are regional and local.

It should also be pointed out that a significant number of independent digital media have emerged with increasing connections by different audiences. Given that many of these media do not work with the commercial logic of traditional media, their positions on the facts are much more critical. Such is the case of *La Silla Vacía*, founded by Juanita León with funds received from the Open Society Institute which today is considered one of the most independent media in the country. Other news media platforms also stand for their independence from commercial and political interests are *Razón Pública*, *Verdad Abierta*, *La 2 Orilla* and *KienyKe*. A new portal called Los Danieles was recently launched by Daniel Coronell, who was fired from *Semana*, and Daniel Samper Ospina, who resigned from the magazine in solidarity with Coronell. This portal has quickly become an example of independent journalism.

Given the negotiation of the peace process and the scarce State presence, producing a fragile public order in certain areas, there is a demand of information about topics such as the advance of the agreement of the peace process and facts related to human rights. Different digital initiatives such as *Pacifista*, *Rutas del Conflicto*, *Verdad Abierta* and *Razón Pública* have emerged, some of them funded with international resources coming from European countries and the United States. They are playing a key role in monitoring fundamental topics related to the advance of the peace agreement, the role played by different key government actors in the peace process and the voice of the victims of the conflict, which are essential to guarantee a well-informed public sphere in regards to public affairs.

The national channels *RCN* and *Caracol* have their digital platforms that offer a live signal and upload episodes of their programmes, thus adapting to the new way of watching TV. Caracol even has its own website dedicated to audiovisual productions such as *Caracol Play*. Both are involved in producing web series.

Digital media have been incorporated into projects related to the peace process in the country. The Victims Unit launched *Paz a la Voz*, a digital video game that, through playful-pedagogical content and multimedia formats, allows children and young victims of the armed conflict to learn about opportunities offered by the Participation Protocol. The application was developed by the company Medea Interactiva, winner of the Participathon #VocesAgudas, a contest convened in March 2018 by the Victims Unit with the support of various international and national organisations, demonstrating the constructive use of digital media in the post agreement era.

Conversely, the National Liberation Army (ELN in Spanish), one of the main Colombian armed groups, constantly publishes articles in its print and digital magazine *Insurrección*. The former armed group FARC-EP, now called *Fuerza Alternativa Revolucionaria del Común* (Revolutionary Alternative Force of the Common), has his own portal and its own media press agency *Agencia de Noticias Nueva Colombia* (News Agency of the New Colombia - ANNCOL) that have alliances with several media linked to social organisations such as the Rural Press Agency, the Alternative Media Network - Colombian Popular Press Agency (REMA-ACPP), and the Popular Communicators Network of the South of Colombia (RECPSUR).

Social Networks

The use of social networks has grown exponentially. According to a recent 2020 report, there is a total audience of 35 million users, representing 69% of the population, a figure that increased in the last year by 11%, representing about 3.4 million new users. 98% of all users access social media platforms through their cell phone. People between 16 and 64 years old report the use of at least 100% of the social network, 63% for work purposes ([Min Shum, 2020](#))

The most used social networks in Colombia among active users are: YouTube (98 percent), Facebook (95 percent), WhatsApp (90 percent), Instagram (77 percent) Google+ (36.2 percent), FB Messenger (73 percent), Twitter (55%), LinkedIn (37 percent), Skype (34 percent), Snapchat 32 percent), Tumblr 819 percent) and Line (18 percent). In respect to Facebook, this social media reaches an audience of 32 million users, of which 51.5% are women and 48.5% are men.

As well as offering entertainment, in Colombia social networks are recently being used by political activists to reach as many people as possible. In this way, Twitter has quickly become a permanent source of political information. Leaders of different political parties and tendencies use Twitter to list topics of national interest, frequently affecting the thematic news agenda. Armed groups are also increasingly using social media. Campos Iriarte (2017) documented how the now political movement FARC is training its members to use social media as a means of communicating their political message to the Colombian people. Timochenko, former leader of the FARC, "has become an avid social media user" reported Campo Iriarte. Moreover, a huge polemic raised when a video was spread in social networks where Nicolas Rodriguez Batista, alias Gabino, the most important leader of ELN, appeared teaching children the importance to preserve water and protect it from multinational companies.

While there is a relative effect of democratisation when these media make the opinion of any citizen public, yet both Facebook and Twitter have also become channels that allow the promotion of political intolerance, hate speech and the dissemination of fake news. In fact, some right-wing parties have used social networks to attack journalists who denounce issues that affect these parties in some way. Daniel Coronel, one of the most important investigative journalists, has been constantly attacked by former president Alvaro Uribe and his followers on different social networks because of his columns related to Uribe's wrongdoings. There is also the remarkable case of Matador, one of the most critical caricaturists who decided to close his social networks because a follower of the Democratic Center party threatened his life. A study by .co Internet and the National Consulting Center (CNC) showed that during the 2018 presidential elections in Colombia 57 percent of the population was informed of the development of the electoral contest through social networks, which means this is a

phenomenon that deserves the highest consideration.

According to a study by the *Universidad del Rosario* on the behavior of Colombians on the Internet, with respect to the 2016 plebiscite, it is argued that although "echo-chambers" are contentious issues, a certain homogeneity cannot be ignored in the way in which people get information on social networks such as Twitter. Colombians select who to follow and tend to get more involved in political discussions with individuals with same thoughts. Another example of echo-chambers was given in Colombia through WhatsApp, also in the 2016 peace agreement referendum period. Through massive messaging chains, the belief that voting No to the agreement, would be the best option to "protect the family" and avoid to become the "next Venezuela" was massively advertised. Later, the same promoters of that campaign would admit that these had been lies to convince the population to vote for the No.

Opinion Makers

In 2016 the communications and marketing consulting firm called Porter Novelli, conducted a research entitled Study of Authority of Digital Influencers. The objective of this project was to understand how the position of influencers has an impact on the communicative process and what their influence on the positioning of a brand with respect to the audience is. In addition, it analysed the importance of these people when reinforcing values such as truthfulness and relevance in an environment full of post-truths such as social networks and the Internet.

The study showed that digital influence in Colombia is led by people/influencers (71 percent), media (18 percent) and brands (11 percent). According to these results, the group of people who have been called influencers impact more than 50 percent in the opinion of those who follow them, which are usually between 18 to 38 years of age. As many other countries in the world, social media such as Twitter have gradually become in an important source of information for most news media. Influential political leaders such as Alvaro Uribe uses Twitter to inform about different topics of the national agenda, which are then quoted in most print and broadcast media. The information tweeted by Senator Uribe tends to be questioned/commented by different political and social actors, creating a series of loops that allow positioning Uribe's theme on the national news agenda.

The Study of Authority of Digital Influencers has identified five categories:

1. Fashion, where it was found that the most followed profiles are those of actresses or presenters such as Carolina Gómez, Beatriz Arango, Yuri Vargas and Jennifer Leibovici; the relevant brands of the sector are Studio F, Bata Colombia, Abril One and Bésame Colombia; and the media are *Caracol News*, *Caracol TV*, *RCN Channel*, *El Tiempo* and *RCN Radio*.
2. Technology, with most influential brands such as LG, Samsung, Sony and Playstation; media such as *Caracol Radio*, *La FM*, *Enter* and *Dinero Magazine*.
3. Consumption, which reflected that the most influential people in Colombia are Carolina Gómez, Felipe Arias and José Carlos García. Falabella, Éxito, Samsung Colombia and Panamericana brands are leaders in this sector; while in the media *El Tiempo*, *FM* and *Marketing to Marketing* are very influential.
4. Sports, where the most influential personalities are Falcao, James Rodríguez, the Colombia National Team, David Ospina and Freddy Guarín. The outstanding brands are Samsung Mobile, Cerveza Águila, Huawei Mobile, Adidas Colombia and Puma.
5. News and Politics, where the prominent people are Daniel Coronell, Antanas Mockus, Daniel Samper and Vladdo, while the most influential media in this sector are *Semana*, *El Espectador*, *El Tiempo*, *W Radio* and *Noticias Uno*.

This latest data is confirmed by a study developed by the firm Cifras y Conceptos, which in a report of 2019 showed that the most read columnists in the political sphere are Daniel Coronel (23 percent), María Jimena Duzán (12 percent), Daniel Samper Ospina (10 percent), María Isabel Rueda (6 percent), Antonio Caballero (5 percent), Mauricio Vargas (4 percent), Ramiro Bejarano (3 percent) and Hector Abad Faciolince (3 percent). In addition, traditional print media often have informal opinion columns. Examples of this are *La Pulla*, which is an audiovisual opinion column of *El Espectador*, and *El Colombiano Blog*, which honours the newspaper that precedes it. Other news and opinion blogs consulted by Colombians are *Equinocio*, *Las 2 Orillas* and *Café Guagua*. On Twitter, the most followed politicians are former President Juan Manuel Santos and Senator Álvaro Uribe Vélez, who has 4.89 million followers and is usually controversial in his tweets.

The main conclusion that can be reached with these results is that people understand reality in terms of what they assume as true according to their own values and to the beliefs that reinforce a personal vision of the world. Therefore, this tends to foster ideas when there are relationships with other people who think similarly, even without knowing each other. In a similar way, it is also fair to say that many people tend to trust celebrity figures or public figures whose ideas and opinions about different public affairs issues are aligned with their own views.

Sources

Newspapers

- [ADN Bogotá](#)
- [Al Día Barranquilla](#)
- [El Colombiano](#)
- [El Espectador](#)
- [El Tiempo](#)
- [Publimetro](#)
- [Q'hubo Bogotá](#)
- [Q'hubo Cali](#)
- [Q'hubo Cartagena](#)
- [Q'hubo Medellín](#)
- [Semana](#)

Radio

- [40 Principales](#)
- [Blue Radio](#)
- [Caracol radio](#)
- [La FM](#)
- [La Mega](#)
- [La W](#)
- [La X](#)
- [Olimpica Stereo](#)
- [Radio 1](#)
- [RCN](#)
- [Spotify](#)
- [Tropicana](#)

Television

- [Caracol](#)
- [Cartoon Network](#)
- [City TV](#)
- [Discovery Channel](#)
- [Disney Channel](#)
- [Fox](#)
- [Fox Sports](#)
- [RCN](#)
- [TNT](#)
- [Win Sports](#)

Digital Media

- [Google](#)
- [YouTube](#)
- [Gmail](#)
- [Outlook](#)
- [Wikipedia](#)
- [Yahoo](#)
- [Skype](#)

Opinion Makers

- [Alvaro Uribe](#)
- [Antonio Caballero](#)
- [Café Guagua](#)
- [Daniel Coronel](#)
- [Daniel Samper Ospina](#)
- [Equinoxio](#)
- [Las 2 Orillas](#)
- [Maria Isabel Rueda](#)
- [María Jimena Duzán](#)

Organisations

Trade Unions

The Colombian constitution establishes the right of public and private workers to form unions. However, this is rather an uncommon practice in Colombia. The only antecedent took place in 1984 when *Caracol Radio* was the only journalistic media close to having a trade union made up by employees, which was not recognised by the radio (Carvajal, 2017). The trade

union was the first to issue a strike in 1986. However, the strike failed because the union had few members and limited power.

There is a new attempt to create a trade union lead by FELCOLPER, which is at the preliminary steps. Given the fact that many news media belong to economic conglomerates, there is skepticism that such initiative will succeed.

Journalist Associations

The *Círculo de Periodistas de Bogotá* (Circle of Journalists of Bogotá - CPB) was created on 11 February, 1945 to "maintain as a fundamental canon the free expression of thought, and defend by all media the constitutional and legal norms that guarantee freedom of the press." Nowadays, the organisation proposes the professional improvement of journalists through seminars, conferences and other events.

The *Consejo de Redacción* (Editorial Board) is a journalists association that began in 2006 with the aim of promoting investigative journalism in Colombia so to contribute to the democratisation of information. It develops collaborative processes that integrate training and production of quality content inside and outside the country and supports journalistic entrepreneurship. It currently has 120 members in 20 departments of the country.

The *Colegio Nacional de Periodistas* (National Association of Journalists) is a union of independent journalists founded in Bogotá in 1957 to defend and dignify the profession. Among its founders were Gabriel Garcia Marquez, Luis Jurado (Pepon, a recognised caricaturist) and Fidel Cano (publisher of *El Espectador*) among others. Currently, it has branch offices in 22 departments of the country.

The *Fundación Nuevo Periodismo Iberoamericano* (Foundation for New Iberoamerican Journalism - FNPI) is a non-profit organisation created by Gabriel García Márquez in 1995 aimed at working for the excellence of journalism and its contribution to the processes of democracy and development in Ibero-American countries and of the Caribbean, through workshops and seminars on training and exchange between journalists, collaboration between networks and stimuli for professional development.

Established in 1995, the *Círculo de Periodistas de Cali* (Circle of Journalists of Cali - CPC) seeks to protect journalists' integrity, defend the free exercise of the profession, train members in different topics, guarantee wellness spaces for journalists and their families and many other objectives.

The *Círculo de periodistas y Comunicadores Sociales de Antioquia* (Circle of Journalists and Social Communicators of Antioquia - CIPA) was created in 1962 in the offices of *El Tiempo Medellín* and attended by more than 30 journalists. Its mission is focused on the strengthening of guild relations, the protection of freedom of expression, and activities that allow the organisation to strengthen and position itself as an institution in the community.

News Agencies

The main press agency in Colombia is Colprensa. It is located in Bogotá, although it is integrated with the newsrooms of associated media and affiliates. Colprensa belongs to the Gómez & Hernández Group, controlled by the Galvis and Lloreda families, owners of important regional media. The Agency is made up by journalists, infographers and photographers, who deal with the coverage of national and/or regional news and information events.

The media partners of Colprensa are: *El País*, *Vanguardia Liberal*, *El Universal*, *La Patria*, *La Opinión*, *El Nuevo Día* and *La Tarde*. Affiliated media include: *Q'hubo*, *Publimetro* and *Hoy Diario del Magdalena*.

Audience measurement organisations

The *Agencia Colombiana de Investigación de Medios de Colombia* (Colombian Association of Media Research - ACIM) is a non-profit organisation that studies the behaviour of different media through researches, measurements and audience controls. This organisation carries out the General Media Study (EGM), the Colombian Internet Study and the High Profile Colombian Study. It takes care of Continuous Study of Radio Audience (ECAR), which as its name indicates, studies audience of radio, taking into account national, regional and community radio stations, and the audience they reach.

The *Centro Nacional de Consultoría* (National Consulting Center - CNC) is a private organisation that also led different studies related to the use and consumption of media, marketing and public opinion.

Since 1992 the Brazilian company Kantar Ibope has been responsible for measuring the rating in Colombia. It is a multinational with presence in several countries in Latin America.

Sources

Journalist Associations

- [Círculo de periodistas de Bogotá](#) (CPB)
- [Colegio de periodistas de Cali](#) (CPC)
- [Círculo de periodistas y Comunicadores Sociales de Antioquia](#) (CIPA)
- [Círculo Nacional de Periodistas](#) (CNP)
- [Consejo de Redacción](#) (CdR)
- [Fundación Nuevo Periodismo Iberoamericano](#) (FNPI)

News Agencies

- [Colprensa](#)

Audience measurement organisations

- [Agencia Colombiana de Investigación de Medios de Colombia](#) (ACIM)
- [Centro Nacional de Consultoría](#) (CNC)
- [Kantar IBOPE Media](#)

Policies

Media legislation

Article 20 of the Colombian Political Constitution of 1991 establishes the freedom of expression and guarantees "to every person, the freedom to express and disseminate their thoughts and opinions, inform and receive truthful and impartial information, and found mass media. These are free and have social responsibility. It is guaranteed the right to rectification under conditions of equity. There will be no censorship." Moreover, the article establishes the regulations corresponding to the media in the country.

While the law has a positive side, Colombian citizens are free to create and disseminate "truthful and impartial information" within a framework of social responsibility, allowing anyone to create their own news media. According to a study carried out in 2018 by the Universidad Javeriana and the *Consejo de Redacción* (Editorial Board), of the 914 digital news analysed, 190 were new. However, after a longitudinal analysis that compared the media that were active in the last 8 years, the study found that only 4 out of 10 were still functioning. The fact that there are so many new news media available publicly has resulted in a higher competition over the available advertising money. Large traditional media such as *El Tiempo* have been facing massive laying off of journalists. Similarly, some complaints are starting to circulate about the fact that anyone with a cell phone is believed to be a journalist.

The subsequent regulatory frameworks, depending on the media, have set procedures for the assignment of permits, frequencies, technical parameters, concession charges, surveillance, control, and administration of the electromagnetic spectrum. Law 1341 of 2009, known as the ICT Law redefines the current Ministry of Information and Communications Technologies (MinTic), to which all public media are ascribed.

The most important regulatory aspects of the traditional mass media are explained below, all after the aforementioned Constitution.

Each media is regulated by a set of laws, all related to article 20 of the constitution. In this way, TV is governed by Law 182 of 1995, which defines the public service, its modalities, and the conditions of free competition, the regulated access to the spectrum and the promotion to the national television industry. This law also created the National Television Commission (CNTV) as an autonomous body for control, regulation, monitoring and promotion. The CNTV tended for a certain independence of the government since this would have a seat, but would not be the majority.

Law 182 of 1995 was modified by Law 335 of 1996, which defined and enabled private television, as well as direct satellite television to the homes. This new regulation raised a model, the "mixed" (public networks, private operators), which subsequently entered into crisis in 1999 as the most important private operators started to operate the bids of private channels. Before this, the government had a monopoly on television channels and rented space to different television operators. Hence the need to issue Law 680 in 2001, which made it possible to distribute the television spaces that were free in public networks at better commercial conditions.

In 2012, Law 1507 was issued with the intention of liquidating the National Television Commission, distributing regulatory powers and creating a new, more agile regulatory body. From there follows the creation of the National Television Authority (ANTV) and the atomisation of the responsibilities previously held by the CNTV in the named ANTV, in the Communications Regulation Commission (CRC), in the National Spectrum Agency (ANE) and in the Superintendence of Industry and Commerce.

In 2018, Colombia became part of the Organisation for Economic Cooperation and Development (OECD). With the intention of accepting the recommendations of this body, in 2018 the government presented the draft Law 152, with which it aims to "modernise the ICT sector" by unifying the same in the Communications Regulation Commission and liquidating the National Authority of Television, a project that is still ongoing in Congress.

Regarding radio, the regulatory framework is subordinated to MinTic by Law 1341 of 2009, which focuses on the definition of frequency allocation procedures, and payment of compensations. Resolution 415 of 2010 pronounces the conditions of the service, its scope and purposes, classification, coverage and concession procedures. This resolution is the regulatory framework document for radio in the country, and classifies it by service management, transmission technology and geographic scope.

The exercise of the written press relies mainly on the aforementioned article 20 of the Colombian Political Constitution, to which Article 73 adds that "journalistic activity shall enjoy protection to guarantee their freedom and professional independence." Other articles such as 74 and 112 protect access to public information of any citizen and the right of the political opposition to access the media on equal terms.

As previously mentioned, for these articles, the Constitutional Court declared Law 71 of 1975 unconstitutional, which posed the journalist's card as a requirement to practice the profession and also regulated journalism in Colombia. For its part, Law 29 of 1994, although repealed and modified in many aspects, still maintains current requirements for the circulation of forms, rectifications and clarifications.

To follow the recommendation of the Organization for Economic Cooperation and Development (OECD) regarding the existence of a single convergent regulator in the field of telecommunications, the Colombian government issued Law 1978 of 2019. A specific section was included that centralized in the Communications Regulatory Commission -CRC- the promotion of the television industry, the promotion of information pluralism and the technical and market regulation of said sector (Art. 19). Previously these functions were exercised by the National Television Authority (ANT).

In this new model, the National Television Authority (ANT) is abolished, and the strategic planning of the audiovisual sector, both technically and in the development of public content and the defense of the viewer, depends on the created Audiovisual Contents Session of the CRC. The CRC is made up of 3 expert commissioners, representatives of different industry sectors.

Although with this Law, television comes to be understood as an active part of what the Colombian Ministry of Communication and Information Technologies (Min TIC) has called "the digital ecosystem", the definition of television and its different forms of transmission and reception are still regulated by Law 182 of 1995. Such regulation is considered anachronistic since it does not contemplate or update itself in definitions that cover Over the Top (OTT) services.

Accountability systems

In Colombia there is no special committee or council where the public can appeal if it considers that the journalistic standards have been violated. The majority of media are governed by their own code of ethics, which usually establishes sanctions according to different faults.

The figure of the reader's advocate or defender of the viewer has been a practice implemented by some media. For example, newspaper *El Tiempo* and others had this figure for several years and it was very positive to reflect on the ethical exercise of journalism by the specific media. Although it was a very positive exercise, the media were not obliged to have this figure and eventually disappeared.

However, Law 182 of 1995 established the figure of defender of the viewer for all television channels. Although this is a very positive practice, it is still worrisome that such a figure has no sanctioning faculty. Its role is more of an educational nature and is intended to guide the audience and in some cases develop critical views.

Meanwhile, the ANTV has certain sanctioning faculties, but its scope is limited to warning of the existence of inappropriate content depending on the time zone established in the daily schedule.

Regulatory authorities

The Ministry of Information and Communication Technologies, also known as MinTic, is responsible for adopting, promoting and designing plans, projects and programmes in the Information and Communication Technologies sector. The most important function of MinTic is to increase and facilitate the access of all Colombians to ICTs and all that they can offer them.

The Communications Regulation Commission is a special administrative unit that does not belong to the MinTic. It is responsible for promoting competition, avoiding the abuse of a dominant position and regulating networks and communications services so that services are rendered in an economically efficient and quality manner.

The National Television Authority has the objective to ensure access to television, guarantee information pluralism and the competence and efficiency of this service through the execution of plans and programmes. It also serves as a mediator between users and public opinion, watching the interests of viewers.

The National Spectrum Agency realises the planning, attribution, surveillance and control of the radioelectric spectrum in Colombia. In addition, it provides technical advice for the management and knowledge of it and technical support to MinTic.

Sources

- [Communications Regulation Commission](#) (CRC)
- [Constitutional Court](#)
- [Ministry of Information Technology and Communications](#) (MinTic)
- [National Spectrum Agency](#) (ANE)
- [National Television Authority](#) (ANTV)

Education

Universities and schools

As in many Latin American countries, journalists in Colombia are trained at Social Communication-Journalism Schools. There are more than 100 undergraduate programmes in this area in the country and only 3 of them offer exclusively the title of journalist. Others are called communication, organisational communication or audiovisual media. The programmes exist in public and private universities. The Association of Faculties of Social Communication-Journalism (AFACOM in Spanish) is the union that brings together the programmes of this nature in the country. About 70 programmes are assigned to AFACOM, which establishes guidelines and is responsible for structuring the professional examination carried out at the end of the career of the students.

Undergraduate programmes last for 4.5 or 5 years and include a period of apprenticeship in practice that usually lasts one semester. This semester of practice is carried out in their area of interest, either written journalism, radio, television, and Internet or in other areas of communication such as the organisational area in non-journalistic companies. There are 32 master's programmes. Most programmes take 18 to 24 months. Some of these master's programmes include a special association between some type of media and the University. Part of the training includes a period in some magazine (*Semana*) or in some newspaper (*El Heraldo*). Most of the academic programmes that train journalists combine a theoretical and practical training with a strong humanistic education.

The Ministry of Education (MEN) offers the possibility for undergraduate and postgraduate journalistic programmes to be accredited as "high quality". The process is voluntary and involves a rigorous preparation process and supervisory visits by MEN-appointed peers. For its part, the Latin American Council of Accreditation in Journalism (CLAEP), an international organisation affiliated with the Inter-American Press Association (SIP), accredits journalism programmes in Latin America. Currently, Colombia is one of the countries with the highest number of accredited programmes by CLAEP in Latin America.

There is a distance training program that enjoys certain popularity (UNAD). There are no formal academic training programmes registered in ethnic minority languages. However, it is worth mentioning the experience of the Regional Council of Cauca Indigenas (CRIC), which has opened the Master of International Communication for Indigenous People, in collaboration with indigenous groups from Nicaragua and Ecuador.

These are some of the universities that issue degrees in journalism and communication:

- Universidad Javeriana
- Universidad Externado
- Universidad de Antioquia
- Universidad Pontificia Bolivariana
- Universidad de la Sabana
- Universidad del Norte
- Universidad Santiago de Cali
- Universidad Autónoma de Occidente
- Universidad del Rosario
- Universidad de Los Andes

Professional development

The professional practice of journalism has been limited by precarious salaries, unsatisfactory working conditions and non-formal links in work contracts. Various studies have shown a lack of clear and competitive salary policies that help to dignify the profession, an instability in contracts, a high turnover that occurs in the newsrooms and an increasing practice of hiring freelance journalists, which hamper the labour benefits. Also, journalists complain about the long working hours without paid

overtime and the lack of institutional resources to do their job. This situation is more dramatic in small cities and rural areas, where local media subsist very precariously.

A highly questioned practice has been to pay the salary of the journalists assigning advertising spots they must sell. In the majority of small municipalities, due to a very limited print market, the main source of financing is the official advertising of local or regional governments such as the municipal town hall and state town hall. In some cases, there are mining or agricultural organisations that have an important role in the area and they also become sponsors of news media outlets in the region. However, advertising becomes an important limitation for the free exercise of journalism as any complaint or critical position against any of these institutions that pay the ads brings as a consequence that the such as advertisements are withdrawn. In a recent nationwide study with journalists, 48 percent stated that their medium stopped publishing some type of information in order to avoid losing the advertising.

A recent study carried out by the FLIP found that in rural areas, 40 percent of journalists do not have formal links with the media companies for which they work. For instance, in Putumayo, the department located in the south-west of Colombia, 3 out of 27 news media outlet surveyed did not offer formal contracts. On the other hand in 17 out of 37 news media outlets, journalists must sell advertisements in order to get their salary. In Casanare, located in the central eastern region of Colombia, just 4 out of 31 news media outlet surveyed offer regular contracts with social security and health coverage.

As the FLIP and the Colombian Federation of Journalists (FECOLPER), have warned "journalists in the country go through situations of precariousness in the area of the right to work and this has a notable impact on the right to freedom of expression in the face of freedom of expression."

Media Development Organisations

The most renowned media development organisations in Colombia are:

- Foundation for Freedom of the Press (FLIP) which investigates the conditions of journalism in Colombia and advances actions to promote the guarantees of trade in the country. It seeks the defense of the right to information, freedom of the press, human dignity and the free work of journalists. In addition, it carries out self-protection workshops for journalists in the regions most affected by violence.
- The Drafting Council which is a non-profit association for investigative journalism in the country. It currently has 120 associates in 20 departments and also supports journalistic ventures. It has developed risk-analysis processes for when journalists travel to risk areas in the country.
- The Colombian Federation of Journalists (FELCOLPER) which is defined as an organisation with a social base, and includes 29 associations of journalists and more than 1,200 members. It promotes best practices of free journalism and monitors any violation of freedom of the press, in addition to fighting for better working conditions. It is a subsidiary of the International Federation of Journalists.
- The international organisation Reporters Without Borders, watching over the safety of journalists who are in risk areas where freedom of the press can be attacked.
- The Committee to Protect Journalists CPJ-Colombia which is an international non-profit organisation for the protection of journalists, that fights for freedom of the press. It has one of its headquarters in Bogotá.

Sources

Universities/Schools of journalism

- [Universidad Autónoma de Occidente](#)

- [Universidad de Antioquia](#)
- [Universidad de la Sabana](#)
- [Universidad de Los Andes](#)
- [Universidad del Norte](#)
- [Universidad del Rosario](#)
- [Universidad Externado](#)
- [Universidad Javeriana](#)
- [Universidad Pontificia Bolivariana](#)
- [Universidad Santiago de Cali](#)

Media development organisations

- [Colombian Federation of Journalists](#) (FELCOLPER)
- [Committee to Protect Journalists](#) (CPJ)
- [Foundation for Freedom of the Press](#) (FLIP)
- [Reporters Without Borders](#)

Telecommunications

Mobile network ecosystem

Mobile telephony began in Colombia in the late twentieth century and quickly went from being a relatively expensive service reserved for a certain economic elite, to become popular to such an extent that the vast majority of citizens have and use cell phones. According to DANE, the proportion of people aged 5 years and over who own a cell phone in Colombia for year 2017 was 73.2 percent and 86.3 percent used this type of device.

Different operators offer different types of coverage and are distributed nationwide. In this way, operators such as Avantel have a coverage focused on the large cities of the country and do not reach rural areas. ETB does not cover a large part of the national territory. The same happens with Móvil Éxito, Movistar and Tigo, which have very poor coverage in the South of the country and in the plains area, but still have more nationwide coverage than operators such as Virgin Mobile.

Mobile phones are available at the points of sale of operators and in specialised technology stores, and access to them is relatively easy. Moreover, a great variety of plans is offered from very economic prices that have allowed the high proliferation of devices. In this way, it is possible to activate a cell phone from less than US\$2 and make refills of US\$1. There are plans that include cellular telephony and data plans for Internet access from US\$10 to more than US\$100 monthly. Today, Colombia manages 2G, 3G and 4G networks, depending on the service the user desires. The use of mobile telephony is a widespread practice, even among many indigenous and minority groups in the national territory. There are no taboos or beliefs that inhibit the use of this way of communication in the country.

Although there are certain areas where coverage is limited, there are government plans to improve the offer of services. For example, the National Optic Fiber Project, which has benefited 788 municipalities in Colombia and 2000 public institutions for a total of 4,602,090 beneficiaries.

Company profiles

In Colombia, there are nine large telecommunications companies. These are Claro, Tigo, Movistar, UNE, Virgin Mobile, Avantel, ETB and Exito. The three companies that have a broad domain in the market are Claro, Tigo and Movistar: Claro covers 47.17 percent of the national market. It is a Mexican multinational company owned by tycoon Carlos Slim, which also offers the service of television by subscription, Internet to households and fixed telephony; Movistar, has 23.45 percent of the national market. It is a subsidiary of the Spanish company and also offers the service of television by subscription, Internet and fixed telephony with the Colombian company UNE. Tigo occupies the third position with 18.39 percent of the market.

Main trends

Colombians mostly consume instant messaging applications on their mobile phones. According to a survey by the Mexican company Lanix in 2017, the most used instant messaging app is WhatsApp with 84 percent, followed by Facebook Messenger with 9 percent, Messenger Lite (a version of Facebook Messenger that consumes less space on the mobile) with 4 percent, then Skype and Telegram with 2 and 1 percent respectively. In addition, 77 percent of respondents claimed to have between 5 and 20 apps installed. The mail and messaging apps are the ones that are first consulted at the beginning of the day.

With respect to music and pay TV, Colombians prefer in the first category the applications of Spotify, Deezer, Claro Musica (service offered by the company Claro), Tune in Radio and Smule Sing. The second category is dominated by Netflix, then DirecTV Play, Claro Video (again, offered by the company Claro), HBO Go, Fox Play and Caracol Play, the latter showing the positioning of the Caracol chain in the transition to digital content.

In the country, there are around 30 financial entities, of which 18 to date have decided to launch their mobile services. Bancolombia, Davivienda and BBVA are the most used apps by Colombians. The other 15 applications belong to Banco de Bogotá, Banco Popular, Banco Itaú, Citibank, Banco GNB Sudameris, Banco Occidente, Banco Caja Social, Banco Colpatria, Banco Agrario, Banco AV Villas, Bancamía, Bancoomeva, Banco Falabella, Banco Pichincha and Banco Cooperativo Coopcentral.

Bancolombia dominates the market with almost 8 million unique users. GFK, a company specialised in market research and consumer knowledge, indicates that 70 percent of Bancolombia users are under 44 years old, while in the Davivienda app this public represents 62 percent. In the case of BBVA, 50 percent are over 45 years old. The division by regions is also noticeable, where Bancolombia has more users in the Caribbean, the Coffee and Pacific Axis, Davivienda in the eastern center and BBVA in the south-central region.

Mobile coverage

Mobile telephony coverage in Colombia depends on the operator that people have. Operators such as Avantel has coverage focused on the large cities of the country, which does not reach rural areas. It covers at least the four main cities, Bogotá, Medellín, Cali and Barranquilla and others like Pereira and Valledupar, but it does not reach the plains or the South of the country. ETB does not cover the southern zone of Colombia. The same happens with Móvil Éxito, Movistar and Tigo, which have very poor coverage in the South of the country and in the plains area, but still have more nationwide coverage than operators such as Virgin Mobile and Uff Mobile. Claro, the most used operator, is the one with the most coverage throughout the country. Unlike the other operators, it covers several areas of the Amazon and the eastern plains and in the other regions manages to have good rural coverage with 2G technology.

The region of the Colombian Orinoquía is made up of the departments of Arauca, Casanare, Meta and Vichada that together have around 1,600,000 inhabitants, of near 50 million that Colombia has. The coverage of the operators that arrive in this region is concentrated in the capitals of each department and Claro in some rural areas. In addition, Vichada is one of the departments with the higher concentration of indigenous populations in the country, and the limited coverage in this area excludes the Guahibo, Sikuani, Piaroa, Piapoco, Cubeo, Putumayo, Amorua and Saliva indigenous communities.

The South of the country, its Amazon region, is made up of the departments of Amazonas, Guainía, Putumayo, Caquetá, Guaviare and Vaupés. In the Amazon there are around 960,000 inhabitants, which represent 2.3 percent of the Colombian population. The coverage of Claro, the largest one in the country, reaches Leticia and other areas, but many operators do not even cover the capitals of this region, leaving out of coverage indigenous groups amounting to 9 percent of the Amazonian population (86,417 inhabitants); most of the concentrated in Putumayo and Amazonas.

The Ministry of Telecommunications raises several projects to reduce the digital divide, including future mobile coverage for the whole country. Among these projects are the National Fiber Optic Project, which seeks to connect more and more municipalities, and the Facilitation Project for the Deployment of Telecommunications Infrastructure, which seeks to "find mechanisms through public policy and/or regulations that allow the deployment of telecommunications infrastructure in urban, regional or national networks."

Mobile ownership

Despite the growing use and ownership of cell phones in Colombia, there is still a large digital divide in some areas of the country that prevents everyone to have the same access to mobile devices.

There is a direct relationship between per capita income and access to technologies, that is, the more average income a person has, the more access they will have to ICT and the knowledge they offer. The departments with the most marked digital divide are those in which there are high poverty rates and a large population in rural areas, such as Chocó, Caquetá and Guaviare. Caquetá is, for example, one of the departments in Colombia most affected by violence.

The 2015 MinTIC study related to uses and technology appropriation, shows that Colombians who own a technology device such as a smartphone or computer use them mainly for chatting (54.4 percent), emails (50.7 percent), pictures, profiles, comments and videos (37.7 percent), send or receive compressed files (33.4 percent), watch music videos (32.5 percent) and other uses (13 percent).

Sources

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- [Banco Agrario](#)
- [Banco AV Villas](#)
- [Banco Caja Social](#)
- [Banco Colpatria](#)
- [Banco Cooperativo](#)
- [Coopcentral](#)
- [Banco de Bogotá](#)
- [Banco Falabella](#)
- [Banco GNB Sudameris](#)

- [Banco Itaú](#)
- [Banco Occidente](#)
- [Banco Pichincha](#)
- [Banco Popular](#)
- [Bancoomeva](#)
- [BBVA](#)
- [Citibank](#)
- [Claro](#)
- [Davivienda](#)
- [ETB](#)
- [Éxito Móvil](#)
- [Movistar](#)
- [Tigo](#)
- [Virgin Mobile](#)

Innovation

Landscape analysis

Despite the significant and encouraging progress of the conditions for innovation that Colombia has achieved, such as the appeasement of one of its major internal armed conflicts, the international opening and the increase of available resources for science and technology, the development continues to be low in comparison with other countries in Latin America. According to a report of MinTIC the limited connection that there is between the different sectors of the economy and the universities, must be added to the low investment in Research and Development, being only 0.2 percent of the GDP, while in countries as Brazil or in the OECD occupies 1.2 percent and 2.4 percent respectively.

However, Colciencias reported that according to the latest report of the Global Innovation Index (GII), calculated by The Cornell University in collaboration with the World Intellectual Property Organisation (WIPO) and INSEAD The Business School for the World, Colombia raised two positions from 65 to 63 in the world ranking. While in Latin America, the country remained in fifth place. The objective of this study is to identify the most innovative economies and the reasons that have led to their efficiency.

According to this same report, it was evidenced that Colombia increased the number of graduates in Science and Engineering by one percentage point over the total number of graduates, from 22.7 percent to 23.6 percent. This increase allowed the country to gain two positions worldwide from 38 to 36. Regarding full time researchers (per million inhabitants) Colombia raised one position in the world ranking from 84 to 83. However, comparing the results of 2017, it is highlighted that in Latin America and the Caribbean, Colombia was the third country with the highest rate of increase of researchers (15 percent), after Brazil (29 percent) and Uruguay (24 percent).

Profiles of main tech parks, accelerators, hackathons

Through a social program of the Ministry of Information Technology and Telecommunications (MinTIC) called *Computers to Educate*, Colombia achieved the historic goal of significantly reducing the divide in access to digital equipment and literacy in

public schools. This achievement was acquired through the access, use and exploitation of ICTs in educational communities. The process began with equipping educational institutions with technological equipment such as computers and tablets, continued with providing training to teachers and parents on the use of ICTs, and ended with teaching them what should be done to take advantage of equipment that was in disuse. According to MinTIC, for an effective development of this strategy, more than 2.2m computers were delivered to benefit students from 43,000 public educational institutions throughout the country. In such a way that Colombia went from having 24 children using the same equipment in 2010 to only 4 students in 2018.

Regarding the population in a situation of disability, the survey carried out by the MinTIC reveals that 81 percent of people with visual and hearing disabilities consider that their condition is not an obstacle to using the Internet and 78 percent state that it is a tool that provides them possibilities of labour insertion. For this reason, in search of inclusive innovations, MinTIC carries out the ConVerTIC project. The objective of this project is to make available to visually impaired people the free download service of software such as Jaws and Magic, as well as literacy cycles, which allow them to make full use of computers. Through this initiative, it is affirmed that technological inclusion opens the doors of social, educational, labor and cultural inclusion to this population.

There are some innovative organisations such as *Fundación Capital* (Capital Foundation) that seeks to reduce poverty in the country through investment in technologies. According to a study carried out in November 2017 by the ESADE Institute for Social Innovation in Colombia, the support from the government and several funds with social impact have allowed the development of a large number of initiatives in the field of digital social innovation, whose challenges are mainly education, health and economic growth. However, according to data from the same report, 36 percent of the Colombian population still does not have access to the Internet and, therefore, is without access to these proposals.

Sources

- [ConVerTic](#)
- [Departamento Administrativo de Ciencia, Tecnología e Innovación](#) (COLCIENCIAS).
- [Departamento Administrativo Nacional de Estadística](#) (DANE).

Traditional forms of communication

Summary

Despite the high penetration of media such as television, radio and more recently the Internet and the widespread use of mobile telephony, Colombia retains much of the traditional ways of communication, particularly in less urban centers. Thus, in the DANE survey related to cultural consumption it was found that in 2017, 74.5 percent of people of 18 years and over claimed to attend meetings of churches, organisations or religious groups, 13.5 percent to Community Action Boards and other bodies of community action and 11.7 percent to meetings of Associations, groups, clubs or recreational, sports, artistic or cultural collectives. In this way, face-to-face communication is still highly valued.

On the other hand, the same study revealed that the type of shows most attended by people aged 12 years and more were concerts, recitals, and indoor or outdoor music performances. The second most common cultural activity carried out by Colombians is the attendance of fairs or artisan exhibitions, followed by theatre, opera or dance and exhibitions, fairs or exhibitions of photography, painting, engraving, drawing, sculpture or graphic arts. Attendance of events is still a very

important way of meeting that serves to socialise among a large population. Theatre has become a key form of cultural expression in the post agreement era. The scenic group *Casa E* led a project called *Victus*, which means defeated in Latin. The project involves around 20 people formerly belonging to armed groups or police corps, who work together in a social theatre, helping to discuss post conflict reconciliation in a pedagogic way.

Cinema continues occupying a very important strip in the country. People from aged 12 to 25 years old are the ones who most attend cinema according to the study, followed by the group aged 26 to 40 years and finally people aged 41 to 60 years. Bogotá is the city where more people go to the cinema, followed by the pacific region, the central region, the Eastern, the Atlantic and Amazon/Orinoquía with 22.0 percent. However, the wide reception that streaming platforms have had for audiovisual content as well as the access to films through the Internet has been occupying a larger space, expanding a traditional way of communication such as cinema.

Sources

- [Encuesta de Consumo Cultural](#) (DANE)

Conclusions

Conclusion

The media landscape in Colombia is dynamic and competitive. Although television continues to be the media with the largest audience at the national level, radio and print media occupy a prominent place, with an important audience. The gradual growth of the online media and the use of the Internet should foresee that in future not too distant, this may be the most consumed media at a general level. Today young people consume television, listen to music from the radio and different online platforms and are in communication through the Internet.

The rise of independent media could mean the possibility of counting with a greater number of independent media that allows a greater distancing with political partisanship. Moreover, the existence of different initiatives that aim to denounce issues such as the use of the official guideline in the news could facilitate a greater independent exercise of journalism.

Despite the increasing number of people who inform themselves through social networks and not from traditional media sources, the fact that false news and disinformation exists leads many people to seek confirmation from the more traditional media, tending to trust them for the quality work they do.

Despite many difficulties and different problems that have affected the freedom of expression and the autonomy of journalists, the media are still being sought by a broad audience that follows what is happening in the public agenda, creating a public sphere very useful to make decisions about the context and future of the communities.

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