

# Honduras - Media Landscape

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## Overview

In a study of censorship and discrimination by Oscar Perez (2014), it is said that “Central America is a region where silence is imposed. Only in Honduras, seventy-two percent of journalists claim to have had some violation or obstruction to their work as a journalist; their work environment constitutes serious challenges to develop their activity effectively and above all in a safe way. This situation is detrimental to our democracy, and undermines the right to be informed of citizenship.”

Freedom of press is influenced by the fragility of the Honduran democratic system. The evolution of neoliberal legislation in the media was consolidated in 1990, with the idea that the strategic sector of the telecommunications market would be better off in the hands of private companies, leaving to the state a marginal participation in the regulation of it. This has been done under the premise that the state is a poor administrator and has caused media concentration. This scenario is far from the international standard established by the *Naciones Unidas y el Sistema Interamericano* (United Nations and the Inter-American System).

Consequently, the commercial media sector has reached a strong development, especially through television and audiovisual media. According to the document Performance of the Telecommunications of the *Comisión Nacional de Telecomunicaciones* (National Telecommunications Commission - Conatel) of 2017, television is the most suitable medium for the promotion of the strong market in Honduras, due to its national scope and the various ways of reaching consumers in terms of content and as immediate forms of promotion of linked advertisers (Banking, telecommunications, services). In addition, the structure of open television is highly concentrated and market oriented. According to the same report, there are a total of 338 licensed channels, most of which focus on private or commercial activity, and three on public, social or community activities, with consequences on the diversity and pluralism of the media system.

Another issue that explains the strengthening of oligopolies is that the media market is highly concentrated and the mainstream media are also partners of the advertising agencies and of the companies that they generally advertise (banking, telecommunications, and services). This leads to the statement that cross-ownership is a reality in the national media system. The print media and radio have been more affected by the recent economic and political crisis. In 2017, according to the 2017 study of *Equipo, Reflexión y Comunicación* (Team Reflection and Communication - ERIC) of the Jesus Company, 50.6 percent of Hondurans received news through TV, 27 percent through printed newspapers and 21 percent through radio. This has made print media and radio not profitable, forcing them to further stretch their links with politicians and economic elites to ensure their sustainability. An example is the approval of the law of publicity exchange with the State in return of tax cuts and payment of electricity bills.

The ideological connection of the media was historically defined from the time Honduras was a colony. The first newspapers

were a tribune of the social and economic imaginary of conservative and liberal thought, contributing to the foundation of the Honduran right wing, with its own oligarchic characteristics. Entrepreneurs and owners of the media in Honduras have been characterised by their direct link with the traditional class that has ruled the country, either because of their relationship in business with the State or as members of the dominant political class. According to Mancini (2008) this shows that "the development of private media markets corresponds to a political parallel."

In the case of Honduras, it can be seen that this process of political parallelism has existed at various moments in history. For example, the former President of Honduras, Carlos Flores, is the owner of one of the most influential media in the country. In addition deputies, ministers and renowned journalists are owners of TV channels and radio stations. As such, these channels often align with the political and/or ideological line of their patrons. This situation has favored a rather one-sided or biased style of reporting, often resulting in strong media polarization.

This context of politically-dominated media channels, and the high vulnerability surrounding free reporting, have a strong impact on journalistic ethics and practice. Given the dangers and volatility present in the country, journalists have often had to adapt to the logic of the overall context, which scarcely allows for independent or public-minded reporting. Achieving greater media independence from the country's political and economic powers is a challenge for the profession and democracy at large. The low professionalism of the average Honduran journalist, and the lack of up-to-date academic curricula on the subject, mean that the journalistic practice still lacks the quality standards usually required to this profession. Moreover, journalism professionals are strongly constrained by political powers, who oftentimes focus more on protecting their own interests. Given these constraints on their freedom of expression, journalists are often at risk of marginalization, stigmatization, and in extreme cases can also risk their lives in the pursuit of their profession.

Objective, fact-based investigative journalism is today still in its embryonic phase. Journalism as a communicative action in Honduran society is not yet a process of citizen political mediation, which would strengthen the democratic system. On the other side of the spectrum, there are social communicators in community media, a space that offers an alternate information source outside traditional power structures, and that has the potential to promote fact-based reporting and more balanced narratives, opening communication spaces to numerous, traditionally weaker actors of civil society.

Professional organisations list Honduras as one of the most at risk countries to practice the profession. The precariousness of the journalistic activity in the country threatens the freedom of the press. According to the 2019 annual reports of Freedom House "Honduras, is classified as a 'partly free' country with a so-called Aggregate Freedom Score of 46 out of 100. This degree is consistent with the high levels of censorship associated with ideological submission, violence and criminalisation, which indicates that the union is debating survival."

The *Asociación de Prensa de Honduras* (Press Association of Honduras - APH), has made visible the risks of practicing this profession. Self-censorship and censorship are the characteristics of the institutional weakness that Honduran journalists face on a daily basis. These elements strongly stunt the evolution of objective, independent journalism and raise the question of what the role of journalism in social fields can be when information is strongly influenced and regulated by economic and political interests. Given this scenario, the alternative to have access to information seems to be through social networks. This progressive relevance of social networks as a source of "unbiased" information serves to underlie the ongoing trust crisis in politically and economically-dominated traditional media, which lead people to seek alternative sources. Some of them do not self-name because of the social risks they imply.

On the one hand, the rise of social media and the maturation of a democratic process have increased the demand for more unbiased sources of information capable to nurture and sustain the development of a more dignified and just society; on the other hand, the entrenched power dynamics dominating both the political and the media spheres tend to serve the interests

of the owners of local media and extensively of transnational communication companies.

The professional challenges faced by Honduran journalism can be summarised as follows:

First, there is a need to adapt to new technologies. Social networks and online communities have become a necessity in the development of journalism, in order to inform in an increasingly interconnected world (local and global). Platforms such as Twitter or Facebook are changing the way journalists work. The immediacy and interaction with receivers have become essential elements.

Second, there is the challenge of achieving the highest degree of credibility possible. The proliferation of information has caused the number of news published on the same subject to be very high and of questionable credibility.

Third, the existence of what is called branded content or sponsored content and the advertising linked to it is a potential obstacle to journalistic professionalism and its development, if information and advertising are not clearly differentiated.

In Honduras, State intervention in the media system is high, as media are not aware of their social role, nor are they struggling to maintain journalistic autonomy from the State. According to the social scholar Víctor Meza (Meza, 2002) "the democratic State also contains, within it, the forces that aim to control the press. The search for the submission of the press involves the need to create a "friendly press", discreetly conciliatory, suspiciously tolerant and understanding, not censored but seduced, attracted."

Hence, the *Ley de rescate y promoción del sector de comunicaciones* (Law on Rescue and Promotion of Communications) shows a clear evidence of this intervention in the media. A situation that limits media operations and makes them subject to the State. The functions of communication companies include the task of informing about the initiatives of the State, which have a formative and informative nature, that is, to benefit the population without excluding the media, to which, for their Democratic devotion is rewarded with punishment and censorship.

## Media

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### Print

The Honduran press has contributed to the configuration of a single thought matrix in the Honduran social imaginary, that is to say that it responds to the logic of a mono-cultural and unilinear State. Its evolution has gone hand in hand with the growth of Honduran economic and political groups. The media respond to an ideological position with links that can be seen in editorial lines. In addition, this political tendency has been visible due to ownership ties and the contribution of media to the creation of public opinion on behalf of the political powers.

There are two conditions that have clearly contributed to this growth: Direct ownership of the press by partisan political sectors and direct trade links with the State. Newspapers in Honduras work as an echo chamber, exposing in their "editorial lines" a thought that is adverse or contrary to any information or data that is not related to them. For example, the three main newspapers never cover events that affect their owners or partners of their political sector. The loss of influence and trust from the public, the sharp slowdown in sales volume and the constant political crises of Honduran democracy have caused a "forced migration" towards technology. Manuel Torres, one of the elders of the journalistic scene, in his book *Podere* *Fácticos y Sistema Político* (Factual Powers and Political System), states: "since the mid-90s the influence of the digital age

has gained intensity in the country, stimulated by the proliferation of electronic media and the rupture of the state monopoly in the domain of the radio spectrum.”

According to an interview with a member of the newsroom of *El Heraldo* newspaper, the average daily circulation in 2018 was between 100,000 and 120,000 copies (*Diario El Heraldo* 40,000, *Diario La Prensa* 40,000, *La Tribuna* 40,000), a decrease since previous years. Although the purchasing power of newspapers has declined, there is still an economically active population that consumes, especially amongst the adult population. According to newspaper consumption studies in Honduras, "When it comes to reading newspapers, men tend to read them more than women, 47.5 percent of men tend to read the newspaper, compared to 37.5 percent of women." The newspaper with the largest number of copies belongs to the OPSA group and is read in the Valle de Sula, with a total of 39,222 copies distributed only in that geographical area of the country, which includes one of the most populated cities of Honduras, San Pedro Sula.

Meanwhile, the young population consumes digital press on web pages, and social networks such as Twitter, Facebook, Snapchat and Instagram. As further analysed in chapter Digital Media, the PC remains the preferred device for accessing online press for 67.8 percent of the readers of digital newspapers, although with a drop of five points, followed by mobile phones (47 percent) with a growth of 13 percent, and tablets, with 23.4 percent, according to data published by the AIMC (DIGITAL, 2016).

Regarding this scenario, the journalist and media consultant Francis Pisani, wrote that "change begins in the periphery. It is there where people - our readers and spectators - try new practices. Where the change comes quickly among the generation of younger users, and much more slowly for us. The potential readers of tomorrow are using the web in ways that we can hardly imagine, and if we want to remain relevant to them, we need to understand how Honduran youth are seeing the media written from a different perspective.”

Youths are no longer passive recipients of the messages of journalists, they rather write, comment, share and propose through networks. The new audience of the newspapers written in Honduras decides what to read and how to read it: "I no longer read newspapers on paper, they are no longer fashionable, and the credibility of them is questionable" (Lopez, 2018).

On the other hand, between 2015 and 2018, newspapers have shown a significant reduction in their work forces. The newspaper *El Tiempo* is the company that has made the most layoffs; 350 employees among journalists, photographers, editors, and other personnel, have been dismissed, due to an abrupt closure after the Office of Foreign Assets Control (OFAC) pressed charges for money laundering on behalf of a drug cartel with ties in the USA against the *Empresa Grupo Continental* (Continental Group Company), owner of the ceased daily newspaper. The outlet is now only publishing an online version which is still a media of reference with almost half a million followers on Facebook. Smaller scale dismissals have happened for other newspapers.

The print media market in Honduras is largely controlled by two groups: OPSA, owner of *Diario El Heraldo* and *La Prensa*. And *Periódicos y Revistas S.A.*, owners of *La Tribuna*, *El País*, *Diario Más*, *Más Clasificados* and *LTV*. According to data from the *Asociación de Agencias de Publicidad de Honduras* (Association of Advertising Agencies of Honduras - AAPH), the advertising sector recorded investments of approximately US\$443.2m, of which "The written press obtained US\$75m and grew by 5 percent in the year 2017." This can be explained by increased sponsorships of private companies and for the purchase of advertising time by political parties during that particular year of elections. Data on the losses of each of the newspapers is not available, even though there is a law on access to information.

Below is a list of the media that each of these publishing companies operate:

- Grupo OPSA owns 2 national newspapers *La Prensa*, *El Heraldo* and the national sports newspaper *Deportes Diez*,

- along with local magazines *Estilo*, *Honduras Tips*, *Estrategias y Negocios*, *Super Clasificados*, *GOTV Empleos*
- The group Periódicos y Revistas S.A (Journals and Magazines SA) owns newspapers *La Tribuna*, *El País*, *Diario Más*, *Más Clasificados*.
- Medios de Comunicación Alternativos y Conexos owns newspaper *El Libertador*.
- The Fundación Católica (Catholic Foundation) owns the national newspaper *Fides* and the regional newspaper *PeriódicoLenca*.

The level of coverage of the main newspapers is national. Five newspapers compete for regional territories, *El Heraldo* and *La Tribuna* in the Center-South-East zone and *La Prensa* in the Northwest zone, while *El Libertador* and *FIDES* in the central zone of the country. This market distribution also creates a segmentation of audiences and greater control of the market in each territory. Although, it should be noticed that national newspapers rarely reach rural areas, where regional newspapers largely supply the information needs: They provide news about security, tourism, local history and other topics. One example is *PeriódicoLenca*, which is based in the region of Lempira. Meanwhile, there are large areas of the country where indigenous peoples live that are not covered by print newspapers. The limited development in media and technology of those communities prevents them from reporting.

The emergence and popularity of competing communication platforms, such as popular TV, has led some newspapers to favor a style of reporting more geared toward sensationalistic language and gossip pages, with the object to attract a more popular audience. An example is the creation of *El Caliche* in 2016 by the more affirmed *El Heraldo*, an enterprise that however closed a mere year later due to its failure to achieve the correct positioning in the print media market of Honduras, contrary to what was expected.

## Radio

Radio has decreased its total revenues to L2.6m, which is a tiny fraction of the national GDP of L409.6m (2014). The broadcasting industry is in crisis, due to several factors, first of all many investment projects in broadcasting are not executed and many have relocated infrastructures to less complicated locations that require smaller investments and less maintenance. Secondly, the energy crisis in the country, the cost of updating technology, and the migration of radio advertising to new media such as the digital market and television are the main reasons for the crisis in Honduran radio broadcasting.

In an eminently rural country with an irregular topography, the most penetrating medium in the last 60 years has been radio. The first radio stations were born at the same time as the law regulating telephony and the national post system. For example, *Radio Tropical* was born in 1928 and *HRN* in 1933, both belonging to the current Televiscentro Group. Today these stations continue to have significant audience, especially in rural areas such as Intibuca, Lempira and Santa Barbara in Western Honduras, where the most listeners are found in the population of 35 to 55 years of age.

There are 432 radio frequencies issued in the country: 133 are religious (Evangelical, Protestant and Catholic Church), 19 belong to NGOs, 19 are owned by the government (*Radio Nacional*), 73 belong to America Multimedia, 53 to United Stations and the rest belong to smaller groups. According to Conatel "there are 102 active licenses of the 432 in force, the *Televiscentro* corporation with 21.13 percent, followed by the sum of the Catholic Church with 8.54 percent and the Evangelical Church with 3.9 percent, public television and public radio with 6.7 percent, the National Congress 3.35 percent, the *Universidad Nacional Autónoma de Honduras* (Autonomous National University of Honduras) with 0.52 percent and the secretary of the presidency with 2.84 percent" of FM and AM radio frequencies. It should be noted that several radio stations have national reach, especially *Radio América* and *HRN*. Moreover, these two groups today have been joined by other media groups that are investing in radio, such as *Radio Globo*, *HCH* radio, *Grupo Visión Honduras* and others that have managed to

obtain authorised frequencies of national coverage. It is especially the case of radios that are administered by both Catholic and Evangelical religious groups. According to *Latino Barómetro* a total of 33 percent of the population use radio as their main source of information.

At the same time, it is important to mention that the reforms of media legislation and acquisition procedures made it easier for community radio stations to obtain a license to operate, but also for private individuals to get permissions to open new radio and tv channels. This was possible after 2013, due to the change of frequency ranges from 300 to 400 MHz, which allowed more radio and television frequencies to be integrated into the dial. It was decided to reserve 33 percent of frequencies for community radios, 33 percent for commercial media and 33 percent for public media. The national radio (*Radio Honduras*) is facing one of its biggest crises since its foundation (lacking technological updates, staff and budget), while the rest of government channels, including television, survive by following governmental lines for their programmes. Given this panorama, the commercial sector consolidated, and several practices of granting frequencies have been object of questioning, such as: the automatic renewal of frequencies, having an auction as the mechanism for granting frequencies and the possibility of passing television and radio stations in inheritance, without consideration of the qualification of the inheriting parties. The *Comisión Interamericana de Derechos Humanos* (Inter-American Commission on Human Rights - IACHR), which oversees the right to communication, has raised these observations to the Honduran state on different occasions.

After 2013 this scenario changed. The emergence of Honduran civil society organisations with the community radio movement, plus international pressure for the democratisation of the radio spectrum made the Honduran state recognise community media (radio, television, Internet, cable), through an administrative resolution of the telecommunications regulatory body in Honduras. This resolution, due to its administrative nature, is an explicit recognition of existence, although the community radio movement aspires to a constitutional recognition of community media as the third sector of communications in the telecommunications framework law and in the Constitution of the Republic (LMT).

According to the report of the Committee for Freedom of Expression in Honduras (C-LIBRE) "the community sector barely has 0.26 percent of the total licenses that operate a radio station." In this map in 2014, the first community radio station in the Honduran capital, RDS Radio, was installed, which with a proposal of education, entertainment and use of digital platforms and social networks (Apps, streaming on Facebook) is disputed and captivates a good segment of the capital's radial audience.

It should be noted that various social movements have managed to install community radios, such as *PLAY FM*, the feminist online radio *ROJITA* and others run by youth movements, peasant women, indigenous communities and peasant groups. These radios promise to improve the plurality of voices and social and cultural diversity. They offer programmes and formats adapted to their audience, as well as defined by AMARC in its concepts of community broadcasting *What makes a radio station community?*. Community radio, rural radio, cooperative radio, participatory radio, free radio, alternative, popular, educational: Their practices and profiles are even more varied. Some are musical, others social and others of a mixed nature. They are located both in isolated rural areas and in the heart of cities. Their signals have a range that varies from a radius of one kilometer, to the entire territory of a country or in other parts of the world via shortwave.

Radio continues to be the medium with the highest penetration, especially in rural areas. The indigenous peoples of Honduras, despite their condition of exclusion and abandonment, have managed to install 23 community stations in five of the seven indigenous towns; the majority operating on "free frequency" and two community open TV frequencies, still in the process of being installed. Despite the fact that technological advances and the penetration of new media in indigenous peoples is advanced, the digital divide is still very strong and community radio in FM analogous is the one that complements communication needs. The development of its contents is still empirical and its local newscasts are generalists.

In the country, emigration to digital radio (DAB) is not yet a reality; there are no technological or financial conditions for radio companies to migrate to this new platform. To conclude, radio stations are beginning to transit towards online radio, although this is still a very weak, but advancing trend. Without a doubt, the major radio stations are those most likely to have an App, or streaming services. Online radio is more listened to in the large cities rather than in rural areas, where the analogue FM platform is still dominant.

## Television

In the context of a media system characterised by profound changes, the Honduran television sector has been able to strengthen its leadership, mainly from a business perspective. It controls more than 50 percent of the advertising market. Ads provide the main source of revenue for television service providers. In 2017 advertising investment in television reached US\$298.4m with a growth of US\$2.5m.

While the written press has managed to configure a unique thinking matrix in Honduras and radio has been the most popular media, according to Félix Molina (2014): "TV is today the dominant medium in the Honduran media system and in its expansion they mark two clear stages that still coexist: analogue and digital." In fact, even this sector has registered the impact of ongoing digitalisation trends, as there is an ongoing decrease in the volume of consumers, due to the preference of certain sectors of the population for alternative platforms, such as young people migrating toward online audiovisual offers (eg Netflix). However, even if it's gaining popularity among the youngest, online television is still too small to challenge the dominant position in the market of more traditional television services, so both will probably coexist during the transition to digital television in the ISDB format.

Honduras has 19 digital terrestrial television (TDT) channels, out of a total of 338 open TV channels. The first stage of the analog phasing out ended in December 2018, while the second and final stage will conclude in 2019. According to Conatel "the coverage of the service of open television in Honduras has been surpassed by subscription television (cable and satellite), making the latter the preferred within television signals, even if this service by subscription means is a payment modality; additionally according to the data of households with TV and pay TV subscribers in homes in Honduras, they represent 72 percent." Even if it's gaining popularity among the youngest, online television is still too small to challenge the dominant position in the market of more traditional television services, so both will probably coexist during the transition to digital television in the ISDB format.

The Honduran TDT channels are: *Enlace, Maya TV* (two frequencies), *Choluteca TV, Canal 6, Alfa & Omega Visión, THN, CNTV 20, Campus TV, Metro TV, TV Azteca, RTV, Comercio, Visión TV, UTV, TEN, Activa TV and Metropolis TV*. The analog shutdown in Honduras is coordinated by Conatel. To carry out this process, the country was divided into ten zones. The first stage contemplates the channels of zones one, two and nine, and the second the other regions. Honduras selected the ISDB-T standard for DTT. In terms of content, viewers can choose from over 38 stations from 19 digital channels, three open community television channels, 105 audiovisual TV systems and 100 local channels installed in each of the municipalities or departments. Yet it remains unclear if this supposed diversity of TV channels actually makes the Honduran

television system sufficiently plural that audiences can choose what to watch based on interests and preferences, or whether the programming across channels is so uniform that it creates a virtual echo chamber.

Looking at how the TV landscape has adapted to the current digitalisation trend, three different approaches can be observed: The first one is to invest into new technologies to increase the technical quality of the programmes so to appease a more demanding audience, which has been adopted especially by larger groups like *Televiscentro*; the second one is to migrate toward more tabloid-style and sensationalistic content to attract a more popular audience and raise ratings, such as in the case of HCH; the third trend is the birth of even more channels like *SI TV*, *Waldivision*, *UNETV*, *AZTECA TV*, that fight for a piece of the advertising cake and be in the Honduran social imaginary to influence it, facing an audience vulnerable to persuasion.

In such a competing environment and given their lack of technology and infrastructure, it is hard for the community TV stations to compete for ratings, revenues and innovation, even though they have been noticed for producing more insightful and informative content. It is important to note that the owners of the three communitarian television frequencies are organisations of the indigenous movement: Afro-descendants (Atlantic zone of the country), Maya Chorti (western zone) and Miskitos (eastern zone), where community TV stations are aiming at starting operations using the channels 24, 25 and 42 in their regions.

Finally, in 2017, the television audience in Honduras reached unprecedented numbers in the new digital age. According to *Diario el Herald* "the legal connection reaches users by 60.5 percent by cable of which 31.6 percent is by analog technology, 28.9 percent by digital technology, and 38.8 percent for DTH, 3.7 percent for ITPV and 0.09 percent for MMDS. However, when analysing the 2014 screen quota, we find that the three dominant groups remain: *Televiscentro* with 49.5 percent, *Grupo R MEDIA* with 14.9 percent and *Grupo VTV* with 9.3 percent. The situation changed in 2015, with the entry into the market of the *Grupo Habla como Habla* (Speak as you Speak - HCH) that moved *Televiscentro* to the second place, although *Televiscentro* is still the largest group.

## Digital Media

At the end of 2017 most Honduran newspapers were offering both a digital and a printed version. These digital offers usually consist of two different types of products: A digital version of the newspaper in PDF format or as an application for mobile devices; or, a website, mostly free, where the contents of the newspaper are enriched with pieces written specifically for the web and integrated with videos and images. Articles for the web are organised to optimise their visibility in search engines, such as Google, Bing and Yahoo; social networks are beginning to represent an important channel for incoming traffic flows. The new digital edition allows access through the subscription for free for 7 days to a daily, monthly, semi-annual or annual edition through the kiosk in the App Store and Google Play.

As for digital circulation, in 2015 *Diario el Herald* had around 225,000 views per day; followed by *Diario la Tribuna*, with 81,700 views; *La Prensa*, with 61,100; *El Libertador*, with 30,400; *FIDES* and newspaper *El Tiempo* have even lower digital circulation. The Honduran press maintains the same thematic agenda through its print and digital editions. The stagnation of the circulation of the printed editions, as reflected in the comparative figures between 2008 and 2013, marks a trend of mandatory strategic reflection for publishing companies in that aspect. However, in Honduras the emergence of new independent digital newspapers has also started a new trend in investigative journalism. *NotiBomba* has given a different connotation to news about political scandals and corruption, largely for its ability to use social media to attract new audiences and highlight a report. Although its detractors accuse it of producing undocumented or outright false news, its penetration and influence especially among millennial is marked, largely due to its more upbeat and less solemn style of reporting.

Global consumer trends have caused the broadcasting sector to undergo a series of transformations, in terms of both distribution and content. There has been a significant shift towards webcasting on demand, simultaneous broadcasting on television platforms and broadcasting through specific applications and streaming services. An example of this shift is the use of video streaming such as Facebook Live within national and regional radio news programmes such as *Noticias al Momento* on HRN and on channels *Telesistema 3* and *Telesistema 7* of the Televiscentro group. At the same time, editorial decisions have begun to favor light entertainment content over more traditional news. It is very likely that these trends are the result of increased competition, personalisation and fragmentation of the demands of the audience and the need to attract advertising investments.

Despite the limited capacity of online channels to attract revenue, most major television players are beginning to integrate digital offerings, usually through websites and applications. One outstanding example is *Televiscentro App*, launched in October 2015 by *Televiscentro* that allows viewers to watch a series of live and archived shows for free. Interactions on social media during broadcasts, as well as social media discussions about television, are also growing. The *Frente a Frente* program is the most recent example of this dialogue between digital and analog channels, as the live audiences in the daily programs interacts with a crowd of viewers engaging through tweets online that are read and commented live by the presenter of the debate space. This program is among the most popular on Honduran television. Online journalism is constantly adapting and innovating, testing new ways to engage the audience directly, promote content analysis, and responding to the continuous changes in the technological landscape. This innovation process has at times be accompanied by self-censorship, but the space created by social media such as tweets has also favored greater interaction and free exchange between audiences and information producers.

Other digital media companies relevant for number of readers are: *Hondudiario.com* and *Lanoticia.hn*; There are also other informative pages such as: *Criterio.com*, *Revistazo.com*, *Honduprensa*, *Againstcorriente.com*, *The HN pulse*, *Confidential.hn*, *Connection.hn*.

## Social Networks

Digital divide is still a problem in Honduras. Although there is some progress in Internet penetration in the Honduran society, according to a Conatel study prepared in 2017 "the number of [mobile] subscribers or subscribers of fixed Internet reached a total of 238,455 at the end of this quarter of the year, observing a growth of 1.78 percent with respect to the previous quarter. The number of mobile Internet subscribers or subscribers reached a total of 2,267,184, with a growth of 7.39 percent compared to the previous quarter. In comparison with other Central American countries, it is still low, remembering that only 32.5 percent of a population of 8,304,677 people have penetration" (Conatel, 2017).

According to the study of social networks (iLifebelt, *Estudio redes sociales*, 2017), "more than 90 percent of Hondurans who use social networks do so from a mobile device, with Honduras being the 3rd country in the region with the highest adoption of mobile devices in the region." The mobile applications with the most users in Honduras are Facebook (installed on 92.6 percent of mobiles), WhatsApp (90 percent), YouTube (77 percent) and Instagram (60 percent). Facebook is the most used social media network, with 3 million active profiles, while Instagram had 800,000 users at the beginning of 2018, compared to 600,000 in 2017. WhatsApp is the leader in instant messaging. YouTube prevails in social networks. Twitter is the most used social network of microblogging, although its influence is decreasing.

As shown by a 2016 study by iLifebelt, women between the ages of 21 and 30 use social networks more than men of the same age bracket, while young high-school and university students between the ages of 14 and 30 use mostly Instagram and Snapchat. Young people and women in rural areas continue to use Facebook.

In addition, a specific behavioral trend has been observed regarding the consumption of social networks and news, in which users privilege reviewing their networks (Facebook and WhatsApp) before consuming news. As mentioned above (ERIC, 2017) television is still the main means by which citizens are informed, followed by email for press releases, newsletters and general communication purposes (at 50 percent). However, the social and political impact of social networks in Honduras is becoming a phenomenon, especially in those issues of collective interest and that have to do with the life and management of the state. Issues such as corruption, drug trafficking, migration and the constant questioning of public officials by citizens, become viral in a matter of seconds in the networks and force those who are questioned to pronounce themselves. The so-called "memes" have become modern political satire.

There have been some concerns on the proper use of social networks on issues of hate speech against personalities persists, especially in sectors linked to the national government. However, it is certain that social networks have changed the way news are consumed in Honduras, and have converted these platforms in a battlefield of ideas, where discourses, political tendencies and approaches on how the state should function, are placed. The polarisation of users seems to dominate the discourses in networks such as Facebook, making it easy to cross the line of false information, political gossip and misinformation, which is especially problematic during electoral times. This polarisation in social networks determines to a large extent a lack of plurality, as people tend obtain information from their social media news feeds, which tend to reflect their own opinion back, thereby hardening their positions and preventing dialogue between different parties.

In terms of revenue, advertising on the Internet has increased continuously from 2010 to 2015, with only a slight decrease in 2017, reaching a total amount of around US\$35m by the end of 2017. With this growth in online advertising, according to *Asociación de Agencias Publicitarias de Honduras* (Association of Publicity Agencies of Honduras – APPA) "the industry grew 5 percent in total." In terms of the platform, the online advertising investment of 2017 in Honduras was led by investment in Google, followed by Facebook and Instagram. Search engines and websites are the two main gateways to content for Hondurans. Social networks are in third place, although they are the first in terms of average web browsing time. As for YouTube, the channel *The Focking Team* has to date more than 197,000 subscribers. On Twitter, six of the ten main accounts by number of followers, belong to news media. We also find them among the top ten Facebook fan pages: *HCH*, *The Herald*, *The Tribune*, *Channel 36*, *The Time Diary*, *RDS Radio*, *Channel 5*, *Educational Television Channel 10*, *Channel 11*.

## Opinion Makers

The phenomenon of online presence, is slowly gaining ground in Honduras, along with the expansion of ICTs. Bloggers, influencers and opinion makers can be considered part of a Honduran social resistance and several main columnists stopped writing on newspapers and migrated to the more popular social networks and blogs, shortly gaining traction amongst Hondurans. At the same time, a new generation of content producers emerged, using platforms such as Blogger, which, due to their ease of editing, free and easy to use employment, provide content to a channel that promises to be a space for debate and plurality.

It should be noted that political figures, media and entertainment personalities are also on the list, according to *El Heraldo* newspaper reports. Among the 10 most followed personalities are Carmen Boquín (sports commentator), Salvador Nasralla (former presidential candidate), Elsa Oseguera (journalist), Loren Mercadal (youth presenter), Jean Paul Irías (host of the morning show *Las Mañanas del Cinco*), Mari Bardají, Paola Mazariegos, Rosyl Mejía, Jorge Calix (Member of Parliament), Father Ismael Moreno, Henry Mejía.

The audience of Honduran bloggers is in the young population aged 16 to 27 years, and the amount of reactions and

comments varies between 2,000 and 2m shares in networks, such as Henry Mejia who has become an online sensation under the pseudonym of *JCA La Voz Sentimental*.

Blogs in Honduras mostly speak of the country (tourism, geography, natural beauties, for a total of 13), followed by Honduran literature and culture (13), political and social resistance (10), local or regional blogs (6), academic blogs from the main universities (6), news blogs (5), religious blogs (5), celebrities (4), personal (3), technology (3), sports (3). There is no official data available on the average number of visits per blog.

## Sources

### Newspapers

- [DiarioLenca](#)
- [El Herald](#)
- [El Libertador](#)
- [El Tiempo](#)
- [FIDES](#)
- [La Prensa](#)
- [La Tribuna](#)

### Radio

- [HCH Radio](#)
- [HRN](#)
- [Radio América](#)
- [Radio Cadena Voces](#)
- [Radio Globo](#)
- [RDS Radio](#)

### Television

- [Azteca TV](#)
- [Canal 10](#)
- [Canal 11](#)
- [Canal 6](#)
- [CBC](#)
- [Cholusat Sur](#)
- [Enlace](#)
- [Go TV](#)
- [HCH TV](#)
- [Hondured](#)
- [La Tribuna TV](#)
- [Si TV](#)
- [Suyapa TV](#)
- [Televicentro](#)
- [UNAH TV](#)
- [Une TV](#)

- [VTV](#)
- [Waldivisión](#)

#### Digital Media

- [Againstcorriente.com](#)
- [Conexión HN](#)
- [Confidencial HN](#)
- [Contra Corriente](#)
- [Criterio HN](#)
- [Hondudiario](#)
- [Honduprensa](#)
- [La Noticia](#)
- [Revistazo.com](#)

#### Opinion Makers

- [Carmen Boquín](#)
- [Elsa Oseguera](#)
- [Jean Paul Irías](#)
- [Jorge Cáliz](#)
- [Loren Mercadal](#)
- [Luis Zelaya](#)
- [Mari Bardají](#)
- [Massay Crisanto](#)
- [Padre Ismael Moreno](#)
- [Paola Mazariegos](#)
- [Renata Espinal](#)
- [Rosa Alvarado](#)
- [RosylMejía](#)
- [Salvador Nasralla](#)

## Organisations

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### Trade Unions

Historically, trade unions have had a strong presence in Honduras, campaigning for decent wages, the improvement of working conditions, social benefits and other labour rights. Trade unions are a recognised figure in the Constitution of the Republic, giving workers the right to organise and the possibility to achieve better living conditions. However, despite being regulated, this instrument of organisation of workers is not part of common practices within the media in Honduras.

To date, the only organisation close to being considered as a union is the *Sindicato Independiente de Profesionales del Periodismo de Honduras* (Independent Syndicate of Journalism Professionals of Honduras - SIPROPH), an institution for

"the study, improvement and defense of the interests of the affiliates and whose main objective is to unify the professional workers of Journalism, as a means of protection and respect of their rights and in favor of making possible the professional realisation, dignifying the freedom of the press." SIPROPH is affiliated with the *Federación Nacional de Trabajadores de Honduras* (National Federation of Workers of Honduras - FENATRAH, attached to the CGT).

## Journalist Associations

All Honduran journalists must be members of the *Colegio de Periodistas de Honduras* (Association of Journalists of Honduras - CPH) joining and contributing a monthly fee. This requirement, established by law in 1979, is a key characteristic of the Honduran media landscape. In principle, CPH is in charge of maintaining professional recruitment and ethical standards, but political affiliations deeply embedded among journalists have limited their effectiveness in this last aspect. Honduran journalists can be divided in four main categories: Professional journalists, those who are regularly hired by a news outlet and who have passed the professional examination; independent journalists, who do not have a regular position within a news organisation and who generally have their own digital media; practitioners, those who have a temporary position in a news medium or are attending journalism school and have yet to take the professional exam; social communicators who excel in community and alternative media.

It is important to highlight the organisation of the Central American Federation of Journalists and Organisations, which for the first time articulates collegiate journalists of the CPH, regional journalists of the APH and community journalists of the *Asociación de Medios Comunitarios de Honduras* (Association of Community Media of Honduras - AMCH). This articulation should benefit Central American journalism, and improve the practice of the journalistic profession, especially in a region with much history in common, including contradictions and structural problems.

Besides the formal organisations of journalists, there is the Committee for Free Expression in Honduras C-LIBRE, an association that brings together journalists who defend freedom of expression and the press in Honduras and articulates independent journalists and social activists for the right to communication and freedom of expression. C-LIBRE is in charge of publishing the annual report on Freedom of Expression in Honduras, a document that collects and systematises the situation of freedom of expression, freedom of the press and the human right to communication.

## News Agencies

Honduras does not have a national news agency. International agencies operate in the country via national reporters. The daily content they produce is mainly news related to the government, international cooperation, or national panoramas of international importance. During past events of geopolitical relevance, such as the case of the last cold war and the Nicaraguan counterrevolution and the Salvadoran civil war, the press agencies with a presence in Honduras have been Agence France-Presse (AFP), Associated Press (AP), NOTIMEX of Mexico, EFE, Reuters, and regional and international media correspondents of Univision, CNN, Telemundo and Telesur. During the main political crises of the recent past, there was a strong presence of international press agencies in Honduras, as well as journalists from the main international press chains. At present, this presence is discreet. Several of these news agencies have a mixed character; On the one hand, they can be very politically oriented services, while on the other hand, they often combine entertainment, gossip and news.

## Audience measurement organisations

The *Asociación de Agencias Publicitarias de Honduras* (Association of Advertising Agencies of Honduras - AAPH), is the organisation that takes charge of audience measurement. However, the OPSA group, which owns the newspapers *La Prensa* and *El Heraldo*, the GOTV channel and the regional financial magazine *Estrategia y Negocios*, maintains a strategic alliance

with Navigg, an audience measurement company specialising in Latin America.

The *Centro de Estudio para la Democracia* (Study Center for Democracy - CESPAD) and the Reflection and Communication Team (ERIC) of the Jesus Company (Jesuits) stand out for their studies on electoral behavior. Each year they publish studies and trends of democracy in Honduras, its social reality and political behaviours.

Honduran newspapers stopped publishing the number of copies circulating daily on their covers, complicating the task to assess their level of penetration and engagement. The competition with the new communication technologies has brought them to conceal this number, which instead is well evident on several digital newspapers.

## Sources

Trade Unions

- [Independent Trade Union of Journalism Professionals of Honduras](#) (SIPROPH)

Journalist Associations

- [Association of journalists of Honduras](#) (APH)
- [College of Journalists in Honduras](#) (CPH)
- [Committee for free expression in Honduras](#) (C-Libre)

News Agencies

- [Associated Press](#) (AP)
- [Mexican News Agency](#) (NOTIMEX)
- [The Agence France-Presse](#) (AFP)

Audience measurement organisations

- [CentralAmericaData](#)
- [CESPAD](#)

## Policies

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### Media legislation

The print press has its legal basis in the Press Law promulgated in 1921. Article 1 states that "It is free to express thoughts by word or in writing. No law or authority can establish prior censorship or require bail to authors or printers, or restrict freedom of the press. It has no limits other than respect for the rights of others, morality and public order, for the effect of the penalty incurred for the offense committed through the printing press. In no case may the printing press be seized as an instrument of crime." In this context, print media are subject to very few regulations by the state.

Starting from 1990 the audiovisual system in Honduras underwent a process of adaptation to new neoliberal regulations in telecommunications. In 1995, a new Framework Law on the Telecommunications Sector (LMT) was passed through decree 185-95 and subsequently amended in 1997 through decree-law 118-97. This norm regulates the granting of radio and

television frequencies. There is no general media law in Honduras, so this law regulates radio, television and Internet. The automatic renewals of permits and the auction of radio frequencies prevent media and social organisations from having access to media ownership, in a system which responds solely to the logic of the market.

In the 2000s, some attempts were made to pass legislation encouraging media plurality. In 2013 AMCH was able to have an administrative regulation approved (09-2013), which came after extensive negotiations and advocacy with the regulatory body in telecommunications (Conatel). The reform achieved to renew the media landscape with the start-up of more than 25 radio frequencies and three community television stations, a significant advance in the inclusion of public policies in communications.

There are some rules on the content of the media, such is the case of the non-profit community radio broadcasting regulation that prohibits community media "to include partisan political content programming in their daily programming" (AMCH, 2013). At the same time, the law for the Classification of Public Documents related to defense and national security, popularly known as the "secrecy law" in force since 2014, was promulgated, preventing the media from reporting and obtaining information on topics such as national budget. It consists of 17 articles defining categories and relative classification periods: Reserved Information (5 years), Confidential Information (10 years), Secret Information (15 years) of Ultra Secret Information (25 years). These recent laws harden the exercise of journalism in Honduras on sensitive issues such as corruption. It is also unclear who issues these categories and who decides what information falls into what category or if beyond journalists, there are other organisations that have access to this information.

Regarding online content, it is important to mention the Cybersecurity decree still pending approval in the National Congress. According to the opinion of the congressional commission, this measure "will protect those who may be victims of acts of discrimination or hate crimes, including insult or defamation, or other crimes against public safety, it is imperative to implement a legal mechanism to regulate the management of information on social networks, and must establish obligations for the owners or administrators of websites for the prevention and fight against all forms of discrimination, hate crimes, or other crimes."

However, this provision has raised serious questions regarding its impact on journalists and online content creators' capacity to critique the government and other public offices. The decree would require companies to block or remove all flagged content within 24hr of the initial complaint, to be then evaluated for permanent removal, with penalty the blocking of the entire website in case of non-compliance. This has been perceived as creating a de facto censorship mechanism due to unclear language and too-short compliance periods. As a result, the approval of the law has been stopped in its second debate.

Finally, in 2017 there was an attempt to reform article 335b of the Criminal Code, which is relevant for the practice of journalism. This article penalised the "apology, incitement or justification of the crime of terrorism" through public communication channels, with penalties of up to eight years imprisonment. As a result of the national and international pressure, the congress repealed this article from the penal code of Honduras in February 2018.

## **Accountability systems**

Mechanisms of self-regulation are very weak in Honduras. The closest thing to a mechanism of self-regulation was the one signed in June 2013 between media owners and the National Congress at the time of the failed reform to the telecommunications framework law of Honduras. The original intent of the document, according to the media, was to provide a framework for the regulation of content. The code of ethics of the CPH is not recognised by media owners. In the media system in Honduras there are no conditions to establish a media consumer oversight council. The ombudsman is much discredited. The spread of violence is the raw material for an unethical journalism and without proper management of the

news, in a society that seeks a climate of peace, but which is fragile in its structures as a result of violence.

## Regulatory authorities

As already mentioned, both the structure of the Honduran mass media system and the performance of the professional journalist are deeply influenced by government interventions. Decree 185-95, created both the Framework Law on the Telecommunications Sector (LMTH) and Conatel as the regulatory body of telecommunications whether radio, television, Internet. Conatel is a collegiate body of five members, three president commissioners, and two alternate commissioners. The directory is appointed directly from the executive branch.

Another important feature to analyse is the creation of the Technology and Information Department of Conatel, which includes among its aims:

- [To favour] the expansion and spread of Information and Communication Technologies (ICTs), thereby reducing the digital divide, complying with and enforcing all programs and projects aimed at the development of Information and Communication Technologies.
- [To make] available to the different productive sectors the technological tools necessary for their growth, to contribute to the integral and sustainable development of Honduras.
- [To manage] with private entities, civil society, non-governmental organisations, local governments and all those directly involved with the ICT sector, strategic alliances that foster the development and penetration of ICT in the Honduran population” (Comunicaciones, 2014)

In Honduras, there is no other institution dedicated to regulating the contents of the media. In spite of the fact that the Ministry of the Interior and Justice has been assigned the task of editing and categorising contents in cinema, radio and television, in practice it rarely does. Censorship is usually reserved for moral and/or religious issues, rather than for themes of graphic violence. Even though the Honduran state is secular, the historical influence of the church is quite significant and profound in the consciousness of society. This influence is particularly significant in the inner regions of the country, especially in the media through censorship on moral issues and intervention in issues such as sexual diversity and abortion, among others.

## Sources

- [Ministry of the Interior, Justice and Decentralisation](#) (SDHJGD)
- [National Telecommunications Commission](#) (Conatel)

## Education

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### Universities and schools

As of 2019, five institutions provide the career of journalism in their campuses:

- *Centro Universitario Tecnológico* (CEUTEC)
- *Universidad Católica de Honduras*
- *Universidad José Cecilio Del Valle*
- *Universidad Metropolitana de Honduras Universidad Nacional Autónoma de Honduras*(UNAH)

- *Universidad Tecnológica Centroamericana* (UNITEC)

Currently, there is still no specific data on graduates in journalism. However, according to data provided by the Higher Education Directorate of Honduras "the largest number of graduates is in the area of Education and the area of Social Sciences, Commercial Teaching and Law." Of the faculties listed above, most offer degrees in journalism, audiovisual communication, and publicity and public relations. The offer of a master's degree in Communication is limited. The *Universidad Tecnológica Centroamericana* (Central American Technology University - UNITEC) offers a master's degree in Corporate Communication Management and the *Universidad Nacional Autónoma de Honduras* (National Autonomous University of Honduras - UNAH) offers a master's degree in *Gestión de la Telecomunicaciones* (Management of Telecommunications).

UNAH introduced Journalism studies in 1969, assigning the course to the Faculty of Social and Juridical Sciences. In 1980, the University Management Board agreed to move it temporarily under the Rectory of the University. In 2008, in the framework of the Fourth University Reform, the board restructured the *Centro Universitario de Estudios Generales* (University Centre for General Studies - CUEG) to form the School of Social Sciences, which includes the School of Communication Sciences of which journalism studies is one of the curricula. UNAH's school of journalism brings together a composition of lower and middle class students, children of workers, and mostly professionals, who make use of the public university. In contrast, young people from the upper middle class attend private universities for pre-university studies and then travel abroad. It is important to underline that, even though we are in a digital age, most universities offering journalism degrees, do not use technological advancements, such as online courses, platforms for educational work and others. UNITEC stands out for its online courses and for interacting with its students on its platform.

## Professional development

The development of the journalistic career is weak in Honduras, given that it has been structured in a context of strong clientelism and economic, political and social tensions, which has deepened in the years since the constitutional break of 2009. A National Protection Mechanism has been put in place to prevent the murders of journalists, social communicators and justice operators of Honduras. To this date 42 journalists and 25 social communicators receive protection.

The job precariousness with which journalism is exercised in Honduras can be explained by the low monthly minimum wages they receive (US\$600), which is much better than in other Central American countries but is still far from the ideal minimum wage of US\$800. Many of the communication companies in the country do not pay such amount.

Dagoberto Rodríguez, President of the Journalists Association of Honduras, stated that "our system has a capital of over L400m in shares, buildings and cash, which guarantees this right to our members." However, the lack of growth of affiliates in journalist associations weakens the social prevention systems. The future of those who practice journalism in Honduras is not promising. Amongst organisations, only the CPH has managed to maintain and strengthen a system of social prevention "that guarantees a decent retirement to the journalist who has reached retirement age."

The university extension program of UNAH, and specifically its journalism school, has some agreements or relations with various commercial media in order for students to perform their professional practice there. However, the Honduran community media have contemplated the possibility of signing a specific agreement with the universities, so that journalism students, originating from the areas where community radios and TVs are operating, can do their professional practice at home. Meanwhile, institutions such as CPH and UNITEC have managed to sign an agreement with international institutions, to offer opportunities for specialisation in master's degrees, or doctorates, so that communication professionals can specialise in different areas.

## Media Development Organisations

There are two organisations that seek to gather and defend media communication in Honduras, especially for radio and television. From the commercial sector, AMC brings together the major media and radio and television networks and the *Asociación Nacional de Radiodifusores de Honduras* (National Association of Broadcasters of Honduras - ANARH) which brings together the regional/local media of the commercial sector (regional radio and TV channels and low-power radios).

In the community sector we find two strong movements with different tendencies and approaches to community broadcasting. On the one hand, AMCH brings together 54 radios, three community television stations and various organisations of the Honduran social movements that accompanies the initiatives Community, which make use of the Regulation of Broadcasting for community purposes (2013) but at the same time also accompany Frequency-Free initiatives, especially in indigenous territories that make use of Convention 169 of the OIT.

And on the other hand, the Mesoamerican Movement of Community Radios that includes indigenous and local radio stations that make use of the International Labor Organisation (ILO) agreement and whose approach is not to have any relationship with the state and are unaware of the institutional framework in terms of current community broadcasting, and promote the use of free frequencies. Taking into account the development, the concentration of the media in the oligopolies and the disproportionate distribution of the radio and television frequencies, AMC and ANARH are gather more than 90 percent of the commercial media. In contrast, the AMCH and The Mesoamerican movement of indigenous and popular radio stations captures 0.26 percent of the community radios in Honduras. Here stands out the accompaniment of Radio Progreso, a station of the Jesuits that promotes the articulation and organisation of the media in Honduras.

Cooperation for the development of media in Honduras is still at a starting point. However, a good number of organisations support the media in strengthening their capacities. An interesting finding is that this international cooperation efforts are aimed at strengthening the "independent and community" media that are the most vulnerable given the context in which they operate. Organisations such as the Organisation of the United Nations for Education, Science and Culture (UNESCO) "direct their efforts in the promotion of independent and pluralistic media that provide quality information, advice on legislation and help rebuild the media infrastructure of the country" (Unesco, 2017). It should be noted that their efforts are also focused on strengthening the quality of journalism and journalistic careers, creating pluralist opinions and encouraging the specialisation of the career.

Meanwhile, organisations such as Article 19, IFEX, AMARC, and others concentrate on offering active solidarity in defense of the freedom of expression and in development of alternative media to the communication models installed in the Honduran media system.

## Sources

- Universidad Tecnológica Centroamericana (UNITEC), [Degree in Audiovisual Communication and Advertising](#)
- Universidad Metropolitana de Honduras, [Degree in Social and Public Communication](#)
- Universidad Católica de Honduras, [Degree in Communications](#)
- Centro Universitario Tecnológico (CEUtec), [Degree in Journalism](#)
- Universidad José Cecilio del Valle, [Degree in Journalism](#)
- Universidad Nacional de Honduras, [Degree in Journalism](#)

# Telecommunications

## Mobile network ecosystem

The mobile phone industry in Honduras has been dominated by oligopolies. However, this concentration has not necessarily served to improve access and use of this technology in Honduran citizens, as mentioned in studies published by GSMA. According to their data from 2017, "In the last 15 years, the adoption and deployment of mobile broadband in Central America has suffered a lag with respect to the rest of Latin America." Despite this lag, mobile penetration is 87.57 percent in Honduras. Yet, the mobile ecosystem of "mobile networks, infrastructure service providers, retailers and distributors of mobile products and services, device manufacturers and content providers, applications and mobile services" (GSMA, 2017) can still be considered fragile when taking into account the current market set-up and state regulation policies.

The mobile market is growing rapidly and according to Celtel (2017) "The country already has more than 8m mobile connections, of which almost 30 percent are from smartphones. In turn, the 4G deployment is expected to grow rapidly from 88,000 connections at the end of 2015 to 1.4m connections in 2020." The contribution of the telecommunication sector to national GDP has been significant. The mobile ecosystem generates around US\$300m per year in financing to the public sector in taxes. According to data from the telephone companies, there is a projected investment of US\$200m in 2018. According to the members of the telecommunications companies, the regulatory and compensatory policies of the Honduran state negatively affect the mobile ecosystem in the country. And yet large rural areas of the country remain "unattended or with low or little cell phone signal", especially in areas of indigenous territories, such as the Mosquitia Hondureña, where the population does not have access to this technology.

## Company profiles

Since 1976 and even in 2006, Hondutel maintained control to exploit fixed telephony services, local and international calls, telex, telegraphy, public telephones, aggregate services and Internet, radio and television. But the privatisation policy of the 1990s influenced its stagnation, as a result of not investing in mobile technology and infrastructure. Hondutel, the most profitable state company in the Honduran state, underwent a process of privatisation and market loss, and is currently practically bankrupt.

At the same time, a study carried out by Conatel confirms this argument "regarding market participation at the end of 2014, *Operator Telefónica Celular* (Celtel, from now on Tigo) had a total market share of 59.67 percent, *Servicios de Comunicaciones de Honduras* (Sercom, hereinafter Claro) with 39.51 percent and Hondutel 0.82 percent (Conatel, *Estudio sobre Recargas Electronicas*, 2015).

Below is a brief profile of each telephone company:

With the opening of telecommunications in 1996, Celtel was the first international company to buy band-B *Telefónica Celular*, established in 1994 and operative since 1996, it is a subsidiary of Millicom International Cellular that provides media services and telecommunications in Honduras, under the Tigo brand; It provides its services through the Global Mobile Communications System (GSM) and offers 4G LTE services. In 2015, Celtel was awarded a 7-year extension to a 25-year contract granted in 2005, which offers a solid base to continue developing telecommunications in the country.

Communications Services of Honduras (Sercom Honduras) is a wholly-owned local subsidiary of AméricaMóvil with headquarters in Tegucigalpa, which provides national wireless services under the Claro brand, offering pre- and post-payment plans, and 3G, video, voice and data services. The company started its operations in Honduras in 2003 as Megatel

de Honduras, which was acquired by AméricaMóvil in 2004 and renamed Sercom Honduras in 2005. Meanwhile, the two companies their avowed ambition is to become the largest Internet service provider in the country and provider of telephony and pay TV.

The two companies maintain a market strategy aimed at the younger segments of the population, since according to an Inter-American Bank study, in terms of population, Honduras is an extraordinarily young country, with more than 43 percent of the population under 14 years of age. This ratio has a great impact on the consumption preferences of online services and applications, and consequently, in the telecommunications sector (Zabal, 2012).

It should also be said that the two companies have the duty to provide information to the Honduran judicial system in the event of the prosecution of a crime, within the framework of the Law for the Intervention of Private Telephone Telecommunications, popularly known as "law of listeners" approved in 2011. The impact of this law has been the investigation of people involved in organised crime, drug trafficking, but according to organisations of Honduran civil society "is a law that persecuted members of the opposition, independent journalists and human rights defenders" as well.

## **Main trends**

In Honduras, there is a broad and easily adopted development of mobile money due to two important reasons: The existence of rural regions that are difficult to access and the lack of financial inclusion in these areas. According to the study on mobile banking and mobile money of 2017 by CONATEL named Studio Diners Mobile, in Honduras "mobile banking and mobile money services have allowed the telephone number to become a means to access a bank account for the user, but they also need the involvement of banks and companies mobile which leads to outsourcing problems, for the realisation of payments, purchases, money transactions, receipt of remittances, payroll payments, public services. The coverage of Mobile Telephony is in the 298 municipalities, with technology of 2G (98 percent of the municipalities) and 3G (40 percent), the penetration of the Internet is 36 percent of the municipalities. Mobile penetration is 87.57 percent, indicating the growth potential of this service."

The mobile money market in Honduras is dominated by a Celtel company, subsidiary of Millicom. The brand it has managed to develop is *Tigo Money*, reaching a good number of clients which provides services for peer-to-peer transfers in different sectors of the economy: small agriculture, tax payments through mobile money, payments for services such as water, electricity, telephony and Internet. Today, most mobile money services are available through multiple interfaces including USSD, APP, STK and IVR.2 Dalberg.

Although the mobile money according to this study is still well under development, it has managed to mobilize a very good amount of money in Honduras. "As regards the total amount of transfers through mobile banking made in 2014, they exceeded EUR3.5m. In the national coin lempiras, representing 0.87 percent of the total Gross Domestic Product (GDP) for 2014. Additionally, in the last quarter of 2014, the number of transactions reached was 47 percent, of which the Cash in, the Self-topped payments were the main services" (Conatel, 2017).

The geographic location of mobile money users in Honduras is concentrated in the departments of Francisco Morazán and Cortés (61 percent of the total users). Among the possible favourable scenarios influencing the growth of mobile money in Honduras, we can list: a strong segment interested in mobile banking services, financial inclusion, an effective system for Small and Medium Enterprises (SMEs), the opening of private banks to implement the system. The potential threats come from: excessive charges for the use of the system, the economic crisis, lack of standardisation in the systems of use, lack of confidence on the part of the user, lack of technological education of the user.

In 2017, the most downloaded game applications were Parchis Star, words mania Candy Crush.. In the entertainment

category, Netflix and Zedge Ringtones are leaders.. Tinder and OkCupid are the favorite applications for dating. For travel, Uber and Google Maps are the most used applications. AliExpress and Amazon are the applications that Hondurans use to buy. When Hondurans want to listen to music using apps, they prefer Spotify and Sing! Karaoke Finally. In the category of food and beverages, Subway and Vivino Wine Scanner are among the trending applications. Up to 63 percent of apps users spend more than two hours a day using them, 96 percent of users access applications by mobile phone. On average, a person is subscribed to 5.3 social networking applications and online purchases are increasingly frequent to acquire goods and services.

Most of the applications used by Hondurans are developed in other countries, mainly in the United States. However, there are some national applications that are on the rise. For example, *Honduras Tips* is an application with two main characteristics: (i) it is the official tourist guide, (ii) it offers detailed information of the places that every tourist should know, hotels, restaurants, and others. In addition, *KioskoOpsa*, is the app of the editorial group that brings together several major newspapers and magazines in Honduras, such as *La Prensa* (1,615,078 Facebook followers and 162,005 Instagram followers), *El Heraldo* (1,408,519 Facebook followers and 108,845 Instagram followers) and others. *Centroamérica App* was developed by the Inertia Solutions studio for the *Federación de Cámaras de Turismo de Centro América* (Federation of Chambers of Tourism of Central America). This app is also ideal for tourists, providing information on tourist places, restaurants and artistic events near your current location, with opening hours and addresses. It offers information on more than three hundred hotels in Central America.

## Mobile coverage

The mobile telephony market in Honduras is controlled by two transnational companies Tigo (Millicom) and Claro (AméricaMóvil). At the end of 2017, mobile telephone lines reached a total of 8.23 million subscribers, of which 91.95 percent in pre-payment and 8.05 in post-payment modality.

According to the 2016 report from Conatel, Voice call service (2G) has a geographical coverage of 100 percent of the departmental and municipal capital cities and a population coverage of 90.22 percent. According to Diary Digital Process, as of February 2019 rural areas have a record of 920,000 mobile phones, equivalent to 43.3 percent of the country, while the remaining 1.2 million households cellular devices are used in urban areas. To conclude, there are still areas unattended by mobile telephony, especially in areas inhabited by groups of indigenous and peasant populations, such as the Mosquitia.

The 4G mobile Internet is available to 50.7 percent of the Honduran population, a percentage which decreases to 36.18 percent in municipal seats and isolated areas. It should be noted that in April 2018, the first community Internet network was installed in an indigenous Lenca population in the department of Intibucá in western Honduras, with the help of civil society organisations such as the *Red de Desarrollo Sostenible* (Sustainable Development Network - RDS), AMCH and Internet Society. Its impact is remarkable in the direct connection of more than 3000 families that benefit from the use of community Internet and Wi-Fi, besides the community radio installed in that community is connected to the world through the network. In contrast, cell phone coverage is weak, excluding indigenous groups that inhabit this area, who are exploring community telephony projects in order to overcome this context of exclusion from cell phone coverage, with unknown reaction from the telephone corporations.

## Mobile ownership

The rise of mobile telephony in Honduras since the entry of the first two transnational companies into the market and after the displacement of the state company in the mobile telephony business (Tigo y Claro) private companies is remarkable. "For 2015 it is estimated that there are more than 7m active cell phones, practically one per inhabitant. That is to say, today in

Honduras a boy or girl uses a tablet very well, handles a cell phone well, surfs the Internet, although the digital divide still continues its path of inequality and digital illiteracy" (Rodriguez, 2018).

But the environment is not only mobile telephony: "official statistics reveal that between 1996 and 2005 the average number of households that had at least one television receiver went from 31.6 percent to 62.7 percent, that is, it doubled in just nine years. This phenomenon is similar in terms of access to telephone communication and computers, today from the finest technology, the SMARTV is the sensation in homes of upper middle class, and in popular neighborhoods." In contrast, families living in poverty and social exclusion are debating whether to pay for a residential Internet account or to buy goods of first necessity, and have been heard saying "we can live without certain foods but without Internet and mobile communication who knows" (Suyapa, 2018).

The impact study of telephony and the Internet in the social environment, broadens this problem and according to Lizama (2016), "although the emergence of new technologies produces changes at all levels of society, it is true that those who are most affected, positively or negatively according to the nature of the change, are those that were born at the time of its implantation in society, as well as the subsequent generations that live adapted to the new environment and develop together with these technologies." In this aspect, we have to mention that the development of the Internet and mobile telephony in the country and its commercial development started around ten years ago, it is analysed that the youngest population and of the different educational levels of the country, should be considered as the main subjects in the digital transformation of the country, as well as offering job opportunities and the improvement of the quality of life.

## Sources

- [Claro](#)
- [Hondutel](#)
- [Tigo](#)

# Innovation

## Landscape analysis

Innovation is a pending issue in Honduras. The current efforts are aimed at strengthening the creative capacity of a new generation that was born in a new era, where technology and resources are concentrated. However, educational organisations such as private universities and financial initiatives have promoted technological inclusion. More than 400 innovation projects have been carried out in the country, mainly to promote tourism, energy and communication technologies.

Meanwhile, the innovation tables of Honduras have been formed, which according to the *Asociación Industriales de Honduras* (Association of Industrialists of Honduras - ANDI) are platforms for interaction, cooperation and coordination between the public, private and academic sectors of Honduras and they are integrated by officials, as well as by specialists interested and related to the topic of innovation." In spite of everything, innovation is present in the media, the creation of the apps and the podcasts, in the media is a reality, in the search for new audiences. Smart governments, smart cities, are projects that are about to be carried out in search of digital inclusion.

## Profiles of main tech parks, accelerators, hackathons

The digital age has advanced in Honduras. Since 2014, the first hackathons have been developed. In 2018, more than one hundred young entrepreneurs participated in the Hackathon Honduras Digital Challenge 2018, topics such as citizen security, smart governments and app developers, gathered again. The media, mainly radio and television, are permanently working on innovation and seeking to connect new audiences, for which they develop multimedia apps, and the incorporation of podcasts as a programmatic alternative to transnational musical digital platforms.

In view of this new panorama, the government has signed letters of intent and agreements with Google, Amazon, to strengthen innovation and promote development in technology parks in areas of national interest such as: energy, biotechnology, automation, robotics, and technologies of information and communication. Meanwhile, every year the *Honduras Girls in ICT Day* is celebrated in April, as part of a global initiative promoted by the International Telecommunications Union (ITU) that seeks social inclusion of the girls in the information and communication technologies as a mechanism to fight against exclusion and digital illiteracy.

## Sources

- [Association of Industrialists of Honduras](#) (ANDI)
- [Hackathon](#)
- [International Telecommunications Union](#) (ITU)
- [The Technical Innovation Tables](#)

# Traditional forms of communication

## Summary

Orality is the main asset and the predominant form of communication in Honduras, and it is part of the identity of the different indigenous peoples in the national territory, which include Garífuna, Pech, Tolupán, Lenca, Miskito, Maya-Chortis, English-speaking blacks, Tawahka and also Ladinos.

The oral culture is present in the different media and forms of communication in the 18 departments of the country, which has 9.2 million inhabitants as of 2019, 51 percent of which are women and 49 percent men, mainly living in urban areas (54 percent according to INE). Orality also marks the use of social networks, especially Facebook and mobile telephony with WhatsApp. There are also television programs debating various subjects, which arouse great interest in the audiences, or presenting trivial discussions, in which the life of a certain known or unknown character is debated generating the higher rankings, with influence on other print and digital press media who report about those shows. It is the case of the *Hable como Habla* (speak as you speak) programme.

Traditional Honduran folk culture is at the foundation of the national identity. Quoting the book *La Sigualepa* by anthropologist Mario Ardón Mejía (2017), “we find it in the ways of relating between people, nature and the environment.” Traditional music is played with instruments made with leather, bamboo, ropes, *jícaras*, wood, bait and snails. With these and other materials, elaborate drums, *carambas*, *marimba*, *sacabucho* and more, are made as means to reaffirm culture and tradition. As a result the development of the music market has been more focused on popular music. A public voice with resonance and influence among the decision makers was the late musician, singer and author Guillermo Anderson, who promoted love for the country and nature in his melodies and sang to the migrant population with his song *El Encarguito*. He was made fashionable by the

increasing migratory wave of Hondurans to the countries of the North. Meanwhile, in the *Garífuna* music, Pilo Tejada, who has popularised the snail soup gastronomy of Afro-descendant peoples in Honduras, is very popular.

In the literary tradition, since colonial times, magical stories, legends, myths and jokes have been the main trends. Topics originate in traditional popular theatre (Moors and Christians, giants, *paisanazgo*, *mojigangas*), pastoral games and children's songs, lauds or praises, sayings and more. Traditional games, festivals, are present at times defined in the national calendar; the municipality of San Marcos in Santa Barbara, in the West, is recognised as the Capital of Traditional Games, by executive decree. Also in the West, in Trinidad, the ancestral tradition of burning giant chimneys has been recovered, as a form of popular expression to address issues that concern the population such as politics, corruption, environmental care.

The development of cinema and audiovisuals is still weak. However, Honduran filmmakers have managed to stage several film proposals of technical and argumentative quality. The lack of a film law has made it difficult for the creative economy to develop, according to Mario Hernan Mejia, Art Director of the UNAH, "even in Honduras, the creative economy in art is a challenge for audiovisual, and incorporates other disciplines understanding this, such as the one around cinema: Advertising, social networks, refreshments, media, cinemas, we must move forward so that the creative economy contributes to the Gross Domestic Product (GDP)." *Morazán*, a dramatic film of 2017 directed by Hispano Duron, was selected as the Honduran entry for the Best Foreign Language Film in the 90th Academy Awards, but it was not nominated.

Theatre is also one of the widely used forms of communication, mainly in the rural area of western Honduras and in the capital of the country, Tegucigalpa, where it occupies an important place as a form of expression of the reality and context of country. Popular street theatre still maintains some presence and is used by the organisations of the popular movements as a piece of militant art.

Religion and spirituality are part of the manifestations and forms of expression, along with topics such as rapprochement between peoples, nature, care of the natural resources, including water, land and mother earth as the original peoples refer to. The religious traditions, like the *composturas*, the *guancasco*, the dances of Moors and Christians (by the Garífunas communities and in Yauyupe and El Paraiso), of Diablitos (in Comayagua) combine elements from neighboring towns, but also from other cultures that have settled in the territory (Mejia, *Folklore Literario Hondureño*, 2017).

The ongoing effort of the international community through financial aid has impacted the reopening of the open town council, an entity more used in the interior of the country, making important decisions that affect the population of the municipality and taking a leading role in local governments and civil society and community organisations. Another entity that affects the decision-making and investment in the territories with poorest households in rural areas, are the *comunidades*.

As for women and young people, who are the majority groups within the Honduran population, the spaces through which they communicate are different. Women do it from home, in the neighbourhood, at work, church, school and in educational and health centers. Some women are organised in housewives clubs and community organisations; they participate above all to achieve improvements in their communities and neighbourhoods. They also use their mobile phone to access the internet and communicate through Facebook or WhatsApp. On the other hand, some of the young population express themselves through gangs involved in violence and minor robbery, some end up entering into organised crime and drug trafficking gangs. It is important to point out that these are not the majority of the young population; the rest uses sports, football especially, as a space to share, in neighbourhood fields and courts. Football is the main sport, and it even manages to paralyse the country, especially when the national team is playing. The phenomenon is also linked to violence among rival supporters.

## Sources

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- [Guillermo Anderson](#)
- [Honduran Institute of Anthropology](#)
- [Morazán Movie](#)

# Conclusions

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## Conclusion

The emerging of new actors and new information offers, the economic crisis combined with technological advances, promote and speeds up important changes in the media landscape of Honduras. Also, the political polarisation that affects Honduras has accentuated the erosion of the current media model for more than three decades. The years of decline in sales and advertising, plus the loss of credibility have caused new investments to stagnate, especially in the broadcasting sector.

There are some media, particularly television, that are still enormously lucrative and provide great benefits to the companies that dominate that sector, despite their outdated formats and genres, and the option of privileging entertainment versus serious and critical content. However, even in this area, the appearance of new digital competitors, in many cases from abroad, has generated uncertainty about the future of the companies that control the current market. The situation of the print media is more critical, due to its constant loss of audience and advertising investment. Meanwhile, the use of new information technologies has displaced traditional market niches and increased advertising revenues, forcing specialisation and migration to digital formats both in the press and on television and at the same time establishing alliances with emerging media to reinforce its offer.

This situation of crisis or, at least, the stagnation of traditional media, coincides with a proliferation of digital media. In the last decade, hundreds of digital publications of all kinds have been launched in Honduras, although the polarisation and politicisation of them in one or another political trend is worrying, confirming the lack of plurality of the Honduran information system.

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