

Mexico - Media Landscape

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Overview

In the past decade, Mexico has become one of the riskiest and deadliest countries where to practice journalism, excluding those at war. The increase in criminal and political violence in regions that function as hubs of criminal activity, organised crime and sociopolitical conflict, pose a continuing threat for both quality journalism and journalists' safety and represent a challenging environment for information access, voice diversity and the quality of democracy overall. In their 2018 joint report, the United Nations and the Inter-American Commission for Human Rights characterise the situation in Mexico as a complex one. On the one hand, there exists a vibrant presence of watchdog reporting and investigative journalism that is being conducted in independent and alternative news media. On the other hand, journalists' killings and anti-press violence are on the rise as crimes and aggressions against journalists remain unsolved and unpunished. Despite an overall improvement in electoral competition and institution building since the political reforms of the late 1990s, the so-called "transitional democracy" of the new millennium has not been accompanied by a political environment that enables the unrestrictive rule of law. There is an absence of strong institutions capable of enforcing the existing legislation concerning the protection of journalists and human rights defenders or of effectively prosecuting crimes against them. The Prosecutor's Office for the Attention of Crimes against Freedom of Expression or the Mechanism to Protect Human Rights Defenders and Journalists within the Secretariat of the Interior, both measures have failed to meet journalists' expectations. In a culture of widespread impunity in punishing journalists' killings, other less visible aggressions such as threats, intimidation, physical attacks, hostility, or criminalisation are not only common, but routinely perpetrated by public officials or security forces. As NGOs and observers suggest, on top of criminal cartels, a relatively new actor in many areas, old suspects are behind a great deal of anti-press violence: local politicians, mobs, security forces or the police, to name a few.

In that respect, a nationally representative survey of 377 journalists conducted as part of the Worlds of Journalism Study in Mexico showed that four in ten surveyed journalists had been threatened, and three quarters of those have been threatened more than once. Of those who have been threatened, nearly 43 percent attribute the source of the threat to a story related to organised crime and around 35 percent to a political story.

The situation has worsened in the past few years. In the latest presidential tenure of Enrique Peña Nieto alone (2012-2018), there have been at least 46 journalists' killings and 1,986 anti-press attacks, according to Article 19, and a recorded number of 119 cases since 2000 –the year of political takeover that finally saw a new, oppositional political party in office after 70 year of single-party rule. At least 20 disappearances and 52 attacks to media headquarters across the country have been recorded between 2006 a 2017. As the figures grow on a daily basis, Mexico is branded a "partly free" country by Freedom House's annual index on freedom of expression.

In a context of growing violence both at the societal level but also at the media-targeted level, journalists feel constantly

threatened and vulnerable. Research shows that those covering violence-related issues normally suffer from depression, post-traumatic stress disorder, and other health related ailments. Journalists who work in risky areas suffer considerably at professional, societal and personal level having to implement and improvise self-devised security measures to protect themselves, such as self-censorship, publishing anonymously, changing daily routines and routes, keeping a low profile, reporting in packs, or even changing location and place of residence. Journalists being displaced from violent locations face constant hardships to re-establish themselves at the personal and professional level. Research shows how media houses rarely provide training, security measures or safety protocols.

At the same time, they have shown impressive levels of resilience and commitment to continue covering sensitive issues, particularly on the effects of corruption, criminal violence, human rights abuses, State repression, missing and displaced people or migration. Most quality work on these topics is being conducted collaboratively and with the support of gremial organizations and overseas funding. The coverage of these issues is not always as broad and deep in mainstream media and it has been up to digital independent media, correspondents from international media or senior freelance journalists working for high-profile media to work on these issues -particularly through long-form formats such as features, magazines, digital and multimedia specials and even authored books.

Apart from limited press freedom in several areas, other systemic characteristics shape Mexico's media landscape. The development of media markets in Mexico is generally weak, with very high concentration of the mass-oriented, broadcasting sector that reaches large national audiences, and a relatively more competitive market of elite-oriented newspapers reaching very small national and regional audiences. In parallel, a style of mass-oriented sensationalist press has historically prevailed across the country, mostly consisting of sports tabloids and crime news locally known as *Nota Roja* (Red News). Their display of morbid, even macabre coverage of crime stories normally boosts circulation figures. These titles often become the main source for revenue in media houses that also publish – or whose main product are — legacy newspapers. Apart from legacy and *nota roja* printed media, a more recent trend has been the widespread circulation and distribution of free dailies in large metropolitan areas, funded by private, usually local, advertisers that normally display human-interest stories and light content. This apparent competitive market would suggest a very large number of newspapers for an equally largely populated country. Only in Mexico City alone, with an estimated population of 25 million inhabitants in its metropolitan area and wherein most of the national media headquarters are located, there are 45 daily registered newspapers in the Secretariat of the Interior Catalogue, most of them intended for regional and national circulation. While the number of newspapers alone could be taken as an indication of a highly competitive market, readerships are relatively low and they all compete for a very small fragment of readers. For example, three legacy national newspapers, *El Universal*, *Reforma* and *La Jornada*, have registered national circulations of less than 135,000 issues per day. In contrast, *nota roja* newspapers like *El Gráfico* and *La Prensa* have nearly twice as much circulations with respectively 278,000 and 300,000 copies, but still lower than in many other countries with smaller populations.

Furthermore, commercial television networks continue to be the most popular and influential sources of news in Mexico, according to the latest Reuters Digital News Report of 2018. However, domestic digital-born outlets are gaining prominence, and printed newspapers still hold an influential and prestigious place, particularly in subnational regions, where they tend to be the most dominant sources for local news and local advertisement, and also the most trusted, according to the report. Local and regional newspapers still tend to set the news and political agenda.

Historically, the development of media industries in Mexico occurred at contrasting paces. The Mexican printed press has always been oriented towards elites, as its origins suggest a development deeply tied to the political and intellectual sphere. The earliest printed publications were never used with commercial purposes, but as the conveyors of ideological and political crusades aimed at the educated, politicised minorities. In contrast, the broadcast industry is a different matter altogether in

terms of successful development and commercial position. Like in most of Latin America, the configuration of radio and television industries clearly imitated the commercial patterns and structure of the US media system, along its sponsored TV news formats, genres and presentation styles. Entertainment has long been the mission of the main terrestrial TV networks in Mexico: *Televisa* and *TV Azteca*.

With respect to political parallelism, there is a sustained history of partisanship. The elitist, partisan press of the XIX century mostly spoke on behalf of the various political factions—ranging from liberal reformists to conservative royalists—that battled to seize power but that also staged passionate debates in the papers and, up to some extent, functioned as the emerging public and political sphere. However, not all the partisan press was necessarily intellectual or philosophical in nature. Press historians have observed the existence of opportunist writers who would sell out to specific interests and would spread during election time, with the sole purpose of backing some candidates or denigrating their rivals. It is a trend surviving to date, with a sui generis market-driven form of partisanship being a key trait of the Mexican contemporary media system. For example, two long standing legacy newspapers, *Excélsior* and *El Universal* were born in that declining period of partisanship, each financed by politicians pertaining to different factions in post-Revolution politics, but both have managed accommodating to the political interests of today.

Instead of commercialism, it was actually the dictatorial political context that has contributed to the temporary decline of militant publications overtly endorsing political causes, be the dictatorship taking place at the turn of 19th to 20th century, or the 70-year-long rule of the Revolutionary Institutional Party (PRI) throughout the last seven decades of the 20th century. The PRI eventually managed to transcend being a mere political party and transformed itself into a political and social complex that laid the grounds for the development of political clientelism, one of the most salient traits of Mexican political culture. It consisted in building its popular sector support through long-awaited benefits in exchange of party loyalty. Clientelism permeated the political life, including the State's relation with the media. In the case of the press, clientelism was based on the discretionary allocation of large budgets of governmental or official advertising in exchange for party support.

As a result, the traditional press-partisanship based on ideological and political affinity — as it was during the earliest days of press in Mexico — is no longer the case. The media system is still deeply entrenched in clientelism resulting in media remaining, in the best of cases, politically neutral when it best suits their interests and becoming actively partisan in favour of certain actors or during certain events—out of convenience. They may choose to align themselves with the politician in government to maximize their opportunities to capitalize large advertising budgets. This is because news media continue to be highly reliant and even dependent on the State's advertising contracts, given the fragmented markets, traditionally low readerships and subscriptions, and underdeveloped private advertising sector. In contrast, governmental agencies and politicians are always eager to publicise themselves, especially as they court citizens' votes.

Within the vast supply of political and official advertisement, the most striking form of partisanship is hardly acknowledged as such: The *gacetilla*, a paid insert typically prepared by government press-officers to resemble a genuine newspaper article that aims to positively publicise government achievements. It can also take place less explicitly through studio interviews with patrons or out-of-character coverage of their activities for the case of broadcast media. A more explicit forms of this publicity include paid adverts publicising official events, calls, achievements, announcements, and all sorts of information related to State-funded and State-managed agencies.

As a result, advertising budgets are frequently denied to critical or independent publications as a form of reprimand, and generous contracts have been historically allocated to loyal news media. According to scholar Chappell Lawson, in the late 1980s only about a dozen of Mexico's 250-odd newspapers could have survived without direct or indirect government assistance.

As the discretionary allocation of advertisement contracts elicits pro-government coverage and hinders pluralism and watchdog journalism, activists and observers have long demanded more transparent criteria and less taxpayer money being spent in publicity. Many State agencies even go over budget when falling in these practices. For example, the think tank FUNDAR, which monitors the transparency in budget allocation, denounced that the federal administration spent nearly 51 thousand million pesos in buying airtime and adverts for official publicity from 2013-17, near double than the total budget for the 2018 federal elections and twice as much of what the Mexican Congress passed originally.

In early 2018, the Supreme Court of Justice resolved that the Congress had to pass a long-postponed Law to regulate political advertising and its allocation on the grounds of democratic, transparent and fair criteria. However, a strong lobby of *telebancada* consisting of the Congressmen representing the main TV networks and media, sought to postpone the passing of the Law, or to spin its drafts in their favor, prompting the mobilisation of NGOs, activists and media observers.

Still, legislation can only get so far and is unlikely to completely discourage the extra-legal negotiations and agreements that take place between media proprietors and politicians or the exchange of mutual benefits. Through the clientelistic press-State relations that political advertising entails, this sui generis form of convenient partisanship has been a key and toxic ingredient of the Mexican media system that has hindered journalistic professionalisation and autonomy.

Journalistic professionalism is generally low in Mexico. For most of the 20th century, the press/state relations embedded in complicity and coercion decisively impacted the journalistic culture and its practices and norms. Due to the partisan nature of the early press, journalism did not consolidate as an autonomous, self-regulated profession with its own set of normative values, missions, code of ethics or public service orientation.

As a result, for most of the 20th century during the era of the industrial press, journalistic autonomy was considerably restricted, and journalists were highly instrumentalised by the ruling political party. There is a wide consensus that, during that extensive 70-year period, mainstream news media, high-profile columnists and TV anchors generally operated as mouthpieces and lapdogs of the regime, with only few, marginal exceptions. The instrumentalisation of journalists in Mexico operated mainly through the implicit complicity between media and political elites. However, the most common means for co-opting salaried, low-paid reporters and editors were '*chayote*' and '*embute*', infamous payoffs distributed in most governmental branches at federal and local levels. Recipients took them as their entitlement to supplement their low salaries and compensate for poor working conditions and job insecurity in exchange for positive or uncritical coverage. These were still widespread practices until the mid-1990s in most governmental branches at the federal and local level, vastly institutionalised in newsrooms, and rarely questioned or deemed as unethical. News organisations generally relied on these extra incentives to entice new recruits and staff.

Other common means of instrumentalisation were commissions on advertising deals, free meals for reporters and news managers, as well as free transportation and hotel accommodation, sponsored junkets to resorts, luxury gifts sent to newsrooms and other benefits for journalists working on a specific governmental beat or for news editors and managers.

The news writing style also reflected this environment. A passive form of reporting heavily relied on official sources. Facts were reported partially and rarely reflected all sides of the story in the sense that the concept of objectivity entails. The Mexican term *declaracionitis* is still a jargon concept to characterise the reporting method consisting of verbatim quoting of sources' utterances and statements, without contrast, context or critical analysis. In its worst form, it led to sycophantic news coverage of thorny and sensitive issues, and the marginalization of oppositional and critical voices.

The gradual professionalisation of journalism occurred in parallel to key events. One of the most infamous examples was the coup to *Excelsior*. The newspaper's growingly critical tone increased State hostility and surveillance that resulted in a

government-orchestrated coup staged by pro-regime staff to enforce the dismissal of director Julio Scherer and his allies in 1976. Upon leaving the paper, they launched weekly *Proceso*, one of the pioneers of watchdog journalism in the country that also faced periods of advertising boycotts and State hostility. Also resulting from the *Excélsior* chasm, other critical newspapers like *Uno más Uno* and *La Jornada* emerged in the early 1980s, endorsing professional journalistic values, embracing civic and democratic norms and becoming the voice for the progressive minorities and emerging civil society. At the other side of the spectrum, *El Financiero* and its serious coverage of financial affairs and the economic crisis in the 1980s also promoted ethical professional values in their staff and became the channel for the pro-market, neoliberal forces. With their critical inquiries and antagonistic styles of presenting, some radio news programmes and anchors also contributed to the gradual democratisation of the media and the professionalisation of journalism in general.

However, as several media scholars would argue, the processes of professionalisation were uneven. Mainstream TV news - commercial and public state channels - and the majority of newspapers were still pro-regime allies until the early 1990s and journalists were trained primarily on the job. However, it was until the launching of *Reforma* in 1993, a centre-right liberal newspaper, that a new cadre of young and educated journalists opposing the old guard of press/state relations and embracing new professional values paved the way for the modernisation of journalism, the erosion of *chayote* and *embute* and the institutionalisation of objectivity and other norms of the profession. However, the results were neither enduring not enough to sustain a widespread adoption of professional norms and values aiming at improving the quality of reporting across news stories, topics and sections.

Still, journalistic professionalisation has improved in the past three decades. According to the Mexico Report for the Worlds of Journalism Study consisting of 377 surveys, journalists tended to be university-educated in 2015: three quarters of survey respondents (75.1 percent) hold a Bachelor degree, and of those, the majority specialised either in journalism, another communication field, or both. With respect to their professional values, in theory, the importance given to roles associated with being a critical change agent was the highest in a one to five scale (mean = 4.36), followed by roles associated to the watchdog function of the press (mean = 4.09). In contrast, the historical roles associated with a propagandist, loyalist function of the press, scored much lower (mean = 3.30). As for ethical standards, 95 percent of survey respondents agreed that journalists should always adhere to professional codes of ethics, regardless of context or circumstance and most of them condemned questionable ethical practices, such as accepting payoffs: only 3.5 percent deemed payoffs justified on occasion.

The study also shows how, despite the endorsement of professional norms, journalistic autonomy is severely constrained by internal and external factors. First, poor working conditions continue as Mexican journalists work on average for 2.21 different newsrooms and over a third of them has additional jobs outside the area of journalism. Moreover, three quarters of respondents perceived to have freedom to select news stories and news angles, but only in broad topics such as poverty or social issues albeit with limitations or in a politicised manner. Only around a quarter of respondents admitted having freedom to report on organised crime in the 2013-2015 survey. Results also show that a great deal of extra organisational, organisational and individual factors influence journalistic work, with organisational (mean = 3.77), economic (mean = 2.90) and sociopolitical (mean = 2.79) factors being the highest sources of influence in a one to five scale.

With a history of political instrumentalisation of journalists and low professionalisation, there are reasons for concern. In the new digital landscape, global forces and commercial pressures are also constraining journalistic autonomy: Journalists perceive audience-related factors to have an increased impact in their work (M=4.27) in a one to five scale. Likewise, apart from the traditional suspects such as the State and political elites, it is now organised crime who threatens and instrumentalises journalism in Mexico. Eight in ten journalists perceive an increase in anti-press crimes, and around six in ten consider that political attacks and mob attacks against their peers have increased.

In sum, despite an overall endorsement of ethical values and professionalisation at the individual level, most journalists still

face a myriad of obstacles to reduce the gap between their norms and aspirations and their actual practice. Not only clientelism continues to undermine their autonomy, but also commercial factors, the digital ecosystems, social polarisation and conflict and organised crime now pose recurring threats to journalistic autonomy.

Despite the private nature of the Mexican media system, State intervention in the media operates in several ways, normally beyond the legal framework of media operations and within a context of clientelism. Historically, until the mid-1990s, one of the most effective instruments of the State in controlling and co-opting the media was the subsidy and monopolisation of newsprint production and distribution by the State supplier PIPSA. In exchange for the low-priced material, publishers were not legally obliged but certainly expected to offer their unconditional support to the party and the president.

Unlike other regulatory practices that allow for the legal intervention of the State or political parties in the media or even in the licensing of journalists, Mexico's media system enjoyed a relatively autonomous and hospitable environment for the development of commercially oriented outlets. Newspapers are not licensed or regulated by any central government-related agency that oversees their functioning, content, or the public's complaints, and the only legislation concerning print media dates back to the 1917 Constitution. The press has been left to regulate itself. With respect to broadcast legislation, by constitutional decree, commercial and public broadcasters make use of a national good – airspace – for their operations; thus, its exploitation can be carried out solely under an airtime licence. The agency in charge of granting such licences is the Ministry of Communications and Transportation, the head of which is directly appointed or removed by the President. Licences take two forms: Concessions granted to commercial broadcasters whose business model is advertising; and permissions, granted to public broadcasters and state agencies to air cultural and educational content but prohibited from airing advertisements. Licensing for all broadcasters can extend for a maximum of 30 years, although in practice they have been renewed and awarded to government allies. Discretionary powers play an important role in the renewal of concessions, which are ratified automatically to their original grantees. Several attempts to regulate the media in the face of pluralism and digitalisation not only have failed to restrain the powers of the main players such as *Televisa*, whose growth has been enabled by lax regulation concerning concentration, but also have in fact to suit the economic and expansive interests of the TV networks.

Media

Print

The legacy newspapers industry in México is composed of long-standing companies that are near to one hundred years old or more, such as (but not only) *El Universal* (1916), *Excélsior* (1917), *El Informador* (1917), *El Siglo de Torreón* (1922), *El Diario de Yucatán* (1925) and *El Imparcial* (1937), as well as newspapers and journalistic holdings that were created in second half of the 20th century such as *Organización Editorial Mexicana* (1976), *El Financiero* (1981), *La Jornada* (1984), *Grupo Reforma* (1993), and *Grupo Milenio* (2000). This mix between old and new companies sustains a hybrid and diverse system of national newspapers that blends authoritarian and democratic practices as well as traditional and modern forms of producing newspapers.

At a local level, there are many newspapers. Some of them serve to a whole state, others to regions and cities. However, there is not a public and reliable census that depicts the characteristics of the local and regional newspapers' industries in Mexico. There are two important trends that can be observed in the local level. First, in the last two decades, local

newspapers have experienced concentration and centralisation processes, where media firms and holdings acquire local newspapers and then incorporate them into national groups. For example, by the end of the 20th century, Guadalajara, the second largest city in the country, had a strong local newspaper market composed of ten local companies. However, in the second decade of the 20th century, *El Informador* was the only newspaper owned by a local family, and the rest of the newspapers were owned by national holdings such as *OEM*, *Grupo Reforma*, and *Milenio*. These patterns can be found in other states of the country.

Secondly, local newspapers, and journalism at large, have experienced serious threats from local governments and criminal organizations. According to Artículo 19's report, "Democracia simulada, nada que aplaudir" (Simulated Democracy, Nothing to Applaud), Mexico has "silence zones" where newspapers and journalists in general cannot publish critical information about public issues and topics related to the war on drugs because their safety is jeopardized. For example, in 2017, in Chihuahua, Miroslava Breach, a journalist that worked for the newspaper *La Jornada*, was assassinated after publishing information related to drug cartels. However, Miroslava's case only exemplifies a reality that pervades many states in Mexico, such Veracruz, Tamaulipas, Oaxaca and Guerrero. In these regions, local politicians and drug dealers have the power of controlling what is published in newspapers.

Historically, Mexican newspapers have had two characteristics that define the industry's general business model. On the one hand, newspapers have presented a low readership. According to the *Padron Nacional de Medios Impresos* (National Registry of Printed Media), national legacy newspapers present a readership that is lower than 200,000 copies per day. For example, *Reporte Índigo* reports 180,000 copies per day, *Ovaciones*, 157,000, *Reforma* 142,000, *El Universal* 120,000, *La Jornada* 110,000 and *Milenio Diario* 104,000. These numbers show that in a country of 120 million inhabitants, legacy newspapers do not have a large readership base. Moreover, it shows that legacy newspapers are read by a social elite composed of politicians, public servants, investors, scholars, students, and so forth. Minority groups have at times organised to produce content that is relevant for them, however, there are no scholarly available sources that document these cases.

On the other hand, this industry has historically relied on a business model based on selling advertisements to the different levels of government. That is, the federal, state, and municipal governments, as well as federal and local institutions of the legislative and judicial branches, buy advertisements to the press. For example, during the first five years of Enrique Peña Nieto's presidency (2012-2017) his administration spent 38bn pesos in advertisements for newspapers. This economic exchange between governments and newspapers lacks transparency and is discretionary and, consequently, has perverted the relations between media and public institutions because it enabled a system where governments have the possibility of controlling the press by allowing or denying the purchase of advertisements to Mexican media. This business model has affected newspapers credibility, which are not trusted information sources. For instance, in a 2016 survey, Parametria documented that 68 percent of Mexicans do not trust newspapers, 23 percent expressed that have moderate trust in the press, and only 6 percent reported to trust these media institutions.

On top of the aforementioned characteristics of the Mexican newspapers, it is worth to mention that this industry has suffered the symptoms of the financial crisis of many other newspapers' industries around the globe, such as a decline in the readership due to a migration of the audiences to other media platforms such as television, cable, and digital news, as well as the impacts of the financial global crises of 1994, 2002, and 2008 that led many private companies to stop advertising in the print versions of newspapers. As a result of this crisis, Mexican newspapers are in constant change, trying to find different ways to survive. All the leading newspapers have made consistent efforts to participate in the online market, and some of them have sought to expand into multimedia and convergent journalistic models, such as Grupo Imagen and Milenio, which are expanding into radio, television and digital media.

Radio

In 2018, Mexico had 392 radio stations in the AM and 1,352 radio stations in the FM frequencies with almost a universal coverage of 98 percent of the whole population. Most of these radio stations pertain to groups and holdings such as Capital Media, Grupo Audiorama, Grupo ABC Radio, Grupo ACIR, Grupo Fórmula, Grupo Imagen, Grupo Radio Centro, Grupo Radio México, Grupo Radiorama, Grupo Radiofónico Zer, MVS Radio, Multimedios Radio, PromoSat de México and Televisa Radio. This means that a group of around twenty companies has been dominating the industry for the past decade and, on the contrary, that there are few radio stations of local entrepreneurs or non-commercial stations such as those owned by universities, non-profit organisations, and indigenous communities.

According to a 2016 survey of the Federal Telecommunications Institute, 41 percent of the whole Mexican population reported being regular radio listeners. The percentage of people that listen to radio in urban and rural areas is basically the same: 42 percent and 41 percent respectively. Up to 79 percent of the people expressed that they like to listen to music, 32 percent newscasts, 15 percent entertainment, 12 percent sports shows and 9 percent cultural topics. As much as 27 percent of Mexican children from 7 to 12 years reported to listen to be regular radio listeners. Thus, although it is not the most popular media system, the radio industry is still relevant as a vehicle for disseminating news among Mexicans.

Every month, the ratings of the Mexican newscasts are released by INRA, a private consultant firm. These ratings explain that *Ciro Gómez Leyva*, *Óscar Mario Beteta*, *Joaquín López Dóriga*, *Denise Maerker*, *Adriana Pérez Cañedo*, *Mario González*, *Eduardo Ruiz-Healy*, *Carlos Loret de Mola*, *Azucena Uresti* and *Sergio Sarmiento* are the top ten journalists and anchors who have the biggest audiences in the country. Six of these radio shows pertain to Radio Fórmula, one of the most powerful radio groups in Mexico. The rest pertains to Stereo Cien, Universal and Radio Red. (Ratings might change in November of 2018 because *Carmen Aristegui*, a senior journalist, returned to commercial radio after two years of being ostracized by the Federal government and private media companies. When her newscast ended, she was in the first places of the national radio ratings. Thus, it is quite possible that her new national show will return to the top ten radio shows in Mexico.)

Last, but not least, it is relevant to mention the Sistema de Radiodifusoras Culturales Indigenistas (Indigenous Cultural Broadcasters System). This radio system is composed of 21 stations that broadcast in regions inhabited by indigenous communities. Most of these radio stations broadcast in original languages such as Nahuatl, Tarahumara, Tzeltal, Mixteco, among many others.

Television

The television industry in Mexico is facing important changes due to legal factors. In 2014 there was a Constitutional and legal reform—which is discussed in a further section—that partially ended the monopolistic nature of this industry. During most part of the 20th-century, the television industry was a private monopoly. In this first phase that began in the 1950s, the Azcárraga family became the owners of all the national networks and most of the local TV systems. In exchange for being a private monopoly, the Azcárraga family, owner of Televisa, was loyal to the semi-authoritarian regime and the newscasts were not allowed to be critical of the president and governors and, in general, of all the public powers.

The second phase of this industry started in 1993, when the Mexican president Carlos Salinas de Gortari allowed to open two national networks. Both networks were bought by Ricardo Salinas Pliego, who founded TV Azteca and emerged as a competitor for Televisa. Nevertheless, instead of competing, Televisa and TV Azteca collided and formed a duopolistic market, which did not change the television contents.

The third phase occurred in 2014, after the creation of a new law that regulates the broadcast industry and that, among other things, pushed for reducing the ownership concentration in the realms of radio, television, and telecommunications - this reform is discussed in a further section - and, in 2016, Imagen Television became the third national TV network in Mexico.

Currently, there are 760 television stations, including seven national channels: *Las estrellas* and *Canal 5*, owned by Televisa, *Azteca 1*, *Azteca 13*, *adn40* and *a+* owned by TV Azteca and *Imagen TV*, owned by Grupo Imagen. As can be observed, the television industry is diversified. However, Televisa still controls 43 percent of the market, TV Azteca 31 percent, Imagen TV 21 percent and other small players 5 percent. In terms of infrastructure, the TV network is the biggest communication system in the country: There are 1.9 TV devices per home, 96 percent of the population reported to own a television, and 49 percent said to have a cable or satellite subscription. In other words, television is the only communication system that has a quasi-universal access for Mexicans.

According to an IFT survey in the second trimester of 2017, the top five most viewed TV channels in Mexico were *Las estrellas* (Televisa) with 57 percent, *Azteca Uno* (TV Azteca) 52 percent, *Canal Cinco* (Televisa) 42 percent, *Azteca 7* (TV Azteca) 37 percent and *Canal 11* (TV Azteca) 10 percent. The same study shows that newscasts (49 percent) are the most viewed content followed by movies (47 percent), soap operas (42 percent), series (32 percent) and sports (30 percent), without mentioning whether this changed depending on the audience. However, studies that measure what people actually watch, differ in results. According to a Nielsen study published by IFT on the 15 shows with more rating in the second trimester of 2017, there are three relevant conclusions that arise: 1) all the shows pertain to the TV station *Las estrellas*; 2) seven shows were soap operas; and 3) only one was a newscast (*En punto con Denise Maerker*).

Digital Media

As in other media markets around the globe, the advent of the Internet promised to diversify and democratise the media system in Mexico. However, things turned out to be different after almost two decades that the Internet started to be a place for media development. The Reuters Institute's 2018 Digital Media News Report contains a particular chapter that describes the Mexican digital media landscape. The results of the survey show that the top online media brands are part of legacy newspapers (eg, *El Universal online*, *Reforma online*, *El Financiero online*), national TV and radio holdings (eg, *TV Azteca news online*, *Televisa news online*, *Imagen news online*), and global media companies (eg, *CNN.com*, *Yahoo! News*). In this ranking, there are only three native digital media: 1) *Aristegui Online*, which is run by the well-known journalist Carmen Aristegui; 2) *Animal Político*, which is one of the leading producers of investigative journalism not only in the online media landscape but in the whole Mexican media system; and 3) *UNO TV*, which is an online television channel owned by the telecommunications billionaire Carlos Slim. If we only focus on native, digital media, the newspaper *El Economista* and the company ComScore, created a ranking of the most visited online digital news outlets. In this study, the most visited news site from smartphones is *UNO TV*, followed by *SDP Noticias*, *Mediotiempo*, *Animal Político*, *La Neta Noticias*, *El Deforma*, *Aristegui Noticias*, *Nación 321*, and so forth.

Social Networks

According to the 2018 Digital Media News Report, Mexico's Internet penetration is around 65 percent, and the *Instituto Nacional de Estadística y Geografía* (National Institute of Statistics and Geography) reported that, of the people who have access to Internet services, 76 percent reported to use social media platforms. The 2018 Media and Devices Usage Report by Millward Brown and Televisa, shows that generally 93 percent of Mexican Internet users use Facebook, 79 percent YouTube, 42 percent Google+, and 40 percent Twitter. A similar study with similar results, the *Study on the Habits of Internet Users in Mexico* (2018), points out that 95 percent use Facebook, 93 percent WhatsApp, 72 percent YouTube and 66 percent

Twitter. It is important to emphasise that these percentages are concerning Internet users, not the Mexican population.

Regarding the use of social media for consuming news, the 2018 Digital Media News Report also offers valuable information. Up to 90 percent of the users reported getting information from online sources and, specifically, 71 percent from social media and 13 percent from blogs. 59 percent of these users expressed to have shared news via social media or email and 41 percent commented on news via social media or website. Finally, we know that 61 percent of Internet users said that they used Facebook for fetching news, 37 percent YouTube, 35 percent WhatsApp, 23 percent Twitter, 15 percent Facebook Messenger and 8 percent Instagram.

Opinion Makers

After performing documentary research in academic journals, media, and on Internet in general, there are no scholarly studies, journalistic stories or rankings that describe and measure the influence of blogs, websites, YouTube channels on the Mexican public opinion. Many bloggers and YouTubers work as influencers, but they operate in the entertainment and advertising realms and very few have an influence on the national conversation and journalistic agendas.

Among these political influencers, some characters deal with political issues—although, most of the time, their analyses tend to be light and banal. Two cases epitomise this kind of influencers. Chumel Torres created the YouTube channel, *El pulso de la República* (The Republic's Pulse), where he discusses topics related to national politics; he has 2.2 million subscribers, and in recent years he began a collaboration with HBO. Callo de Hacha began his career on Twitter, where he started to discuss national politics and other. Then he jumped to other media platforms, such as radio, where he conducts the shows *Tenemos callo* y *La maldita hora*.

Sources

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- [El Sol de México](#)
- [El Universal](#)
- [Excélsior](#)
- [La Crónica de Hoy](#)
- [La Jornada](#)
- [La Razón de México](#)
- [Milenio Diario](#)
- [Ovaciones](#)
- [Reforma](#)

Radio

- [Grupo Acir](#)
- [Grupo Imagen](#) (Imagen Radio)
- [Grupo Radio Centro](#)
- [Grupo Radio Fórmula](#)
- [Grupo Rádiorama](#)
- [Instituto Mexicano de la Radio](#)
- [Multimedios Radio](#)

- [MVS Radio](#)
- [Sistema de Radiodifusoras Culturales Indigenistas](#)
- [Televisa Radio](#)

Television

- [adn40](#) (Televisión Azteca)
- [Azteca 7](#) (Televisión Azteca)
- [Azteca Uno](#) (Televisión Azteca)
- [Canal 22](#) (Secretaría de Cultura)
- [Canal 5](#) (Televisa)
- [Canal Once](#) (Instituto Politécnico Nacional)
- [Excélsior TV](#) (Grupo Imagen)
- [Imagen Televisión](#) (Grupo Imagen)
- [Las Estrellas](#) (Televisa)
- [TV UNAM](#) (Universidad Autónoma de México)

Digital Media

- [Animal Político](#)
- [Aristegui Noticias](#)
- [Nación 321](#)
- [SDP Noticias](#)
- [UNO TV](#)
- [Sin embargo](#)
- [BuzzFeed News](#)
- [HuffPost Mexico](#)

Opinion Makers

- [Callo de Hacha](#)
- [Chumel Torres](#)
- [Pepe y Teo](#)
- [Sofía Niño de Rivera](#)
- [Sopitas](#)

Organisations

Trade Unions

Unions in Mexico were typically co-opted by the ruling party, PRI, and in many ways, still serve as the basis for the operation of clientelism. Unionisation of journalists in Mexico is rare in printed media but typical for the technical staff in broadcasting. One of the most important unions is the National Syndicate of Press Redactors, the closest entity to a national union that

serves as the national representative for the International Federation of Journalists. There is also a Federation of Mexican Journalists Associations (FEPARMEX), that groups the journalists' associations across different States in the country. There are other unions that affiliate eligible workers, such as the Industrial Union of Workers and Artists of Television and Radio in the Mexican Republic (SITATYR) or the Union of Workers of the Broadcasting and Telecommunications Industry (STIRT). These unions do not normally oppose corporate interests but align themselves with the majority of pro-PRI unions

Some individual media houses also host their own unions, like the case of workers at *La Jornada*, the left-wing newspaper created in 1984, with SITRAJOR. Another example is the Union for the Mexican Institute of Radio, one of the public national radio services in the country. Another public union is the Union of Workers of NOTIMEX, the State's News Agency and Mexico's principal.

Journalist Associations

International watchdogs and support groups have headquarters in Mexico City, such as Freedom House, whose principal aim is the protection of human rights and freedom of expression in a country with low scores in both areas. In the same line of work, we find Article 19, an organisation aimed at advocacy, research, safety and protection of journalists, and the general monitoring of press freedom, anti-press attacks, access to information and relevant media policies in Mexico and other Latin American countries.

In a context of labour precariousness, hostile environments inside and outside their media houses and increased risk, journalists have organised themselves to launch coalitions generally aimed at fraternising, improving working conditions and protect themselves. One of the most visible associations of journalists in Mexico, headquartered in Mexico City but with members across the country, is *Periodistas de A Pie* (Journalists on Foot). This network was launched in 2007 with the aim of improving the quality of journalism, empowering individual and institutional allies to acquire new training, and to support, help and mentor independent media projects. Not only they promote the professionalisation of local and regional journalism, but the network produces and showcases award-winning, quality news pieces based on investigative reporting, mainly through innovative storytelling in multimedia formats. They have also organised their work around advocacy and activism on anti-press violence, defending and protecting individual sufferers and supporting each other in coverage of sensitive issues like violence, immigration or human rights abuses. This association has been key in the professionalisation and protection of journalists, and crucially in the promotion of collaborative work and activism.

Other associations existing in the country include a collective of female reporters (Female Reporters on Guard) that groups nearly 150 members across the country and that aims to commemorate killed journalists and create awareness on anti-press violence. Not coincidentally, in states and locations that have long-suffered drug-cartel and criminal violence, as well as anti-press attacks and weak rule of law, there have emerged journalistic organisations that aim to protect their members and be a voice for the guild. Such is the case of Association June 7th in Sinaloa, Association of Journalists of Guerrero State, or the Network of Journalists from Juárez in Chihuahua. Beat journalists have also organised themselves, forming the Mexican Net of Science Journalists or the Mexican Federation of Sports Commentators.

In general, there is not a single national organisation that has managed to affiliate the entire journalistic guild. In fact, by 2013-2015 a representative survey of Mexican journalists found that only a fourth of respondents (25.2 percent) belonged to one or more professional associations.

News Agencies

One of the oldest news agencies in the country is Notimex, the official news service state agency created in 1968 for the

Mexico City Olympic Games. It is a decentralised public agency with technical and managerial autonomy that services not only local and regional media on a vast range of thematic issues, but also countries across Latin America. With a vast network of correspondents around the world, it is one of the biggest news agencies to serve Latin American countries with a regional focus. For its strategic location, Mexico is also host to the regional headquarters of international news agencies like EFE, AFP, AP or Reuters, or financial news agency Bloomberg. Other international wire services with presence in Mexico City are Xinhua, ANSA, DPA, Sputnik News and Kyodo

Legacy newspapers also offer agency services, such as *El Universal* and *Reforma*, both located in Mexico City. Other news agencies are less visible and mainly cater to specialised subscribers. Amongst them we can find Communication and Information about Woman (CIMAC), a civil organisation aimed at producing and disseminating information with a gender perspective. The Mexican Agency of Sports News (Pressports) is also active in the country. Infosel is also a financial news agency that offers a platform of technological services and procedures. Weekly Proceso also offers wire services through its agency Apro and other regional news agencies, such as Agencia Fronteriza de Noticias offers border States news to subscribers.

For photographic services, one of the most esteemed local news agencies is Cuartoscuro, which provides imagery with a social angle and specializes in the coverage of social affairs and events. The agency also offers training and mentoring about photojournalism and technical tools.

Audience measurement organisations

In Mexico, international firms have a greater stake in audience measurements. Leaders on audience research are Nielsen IBOPE, HR Ratings, GfK, Kantar Media and ComScore. They conduct audience measurement for television, radio, printed press and digital media. One of the local firms is INRA, a 65-year old Mexican company that leads audience research and ratings for radio and TV stations across the country.

The Secretariat of the Interior assembles the National Registry of Printed Media that lists the existing publications in each national state, including newspapers, weeklies, magazines, and so on. Although this office does not measure audience research, it publicises the recorded circulation of each existing news outlet in the registry. It is one of the very few sources to offer a list of publications and their circulations in the country. Also, as a public entity, the Federal Institute of Telecommunications is in charge of supervising the use and offer of broadcasting and telecommunications services in Mexico, and publishes regular reports on media consumption.

Sources

News agencies

- [Agencia del Estado Mexicano](#) (NOTIMEX)
- [Agencia Fronteriza de Noticias](#) (AFN)
- [Agencia Mexicana de Noticias](#)
- [Agencia Mexicana de Noticias Deportivas](#) (PRESSPORT)
- [Agencia Nacional de Noticias](#)
- [Agencia Noticias El Universal](#)
- [Agencia Proceso](#) (APRO)
- [Agencia Quadratín](#)
- [Agencia Reforma](#)

- [Agencia Sin Embargo](#)
- [Comunicación e Información de la Mujer](#) (CIMAC)
- [Cuartoscuro](#)
- [Infosel](#)

Trade unions

- [Asociación 7 de Junio](#)
- [Cámara Nacional de la Industria de la Radio y la Televisión](#) (CIRT)
- [Federación de Asociaciones de Periodistas Mexicanos](#) (FAPERMEX)
- [Federación Mexicana de Cronistas Deportivos](#)
- [Red de Periodistas de Juárez](#)
- [Red Mexicana de Periodistas de Ciencia](#)
- [Reporteras en Guardia](#)
- [Sindicato IMER](#)
- [Sindicato Nacional de Redactores de Prensa](#) (SNRP)
- [SITATYR](#)
- [STIRTT](#)
- [STUNAM](#)
- [SUTNOTIMEX](#)

Other media outlets

- [ComScore](#)
- [GfK](#)
- [HR Ratings](#)
- [INRA](#)
- [Instituto Federal de Telecomunicaciones](#) (IFT)
- [Kantar Media](#)
- [Nielsen IBOPE](#)
- [Padrón Nacional de Medios Impresos](#)

Policies

Media legislation

Mexico's print media legislation is old. Newspapers and magazines are regulated by the *Ley de imprenta* (Press Act or Publishing Act), which was elaborated in 1917 in the context of the Mexican Revolution. This Act regulates issues regarding the ownership of physical infrastructures to print newspapers and some elements about public opinion and free speech. Since that time, this Act has been barely modified. This law is obsolete and, as readers can imagine, nobody uses or refers to this law when talking about newspapers' and print media in general. Thus, print media in Mexico are regulated by the general laws of the country.

The legal base that sustained the monopolistic and duopolistic nature of the Mexican television industry was the *Ley Federal de Radio y Televisión* (Radio and Television Federal Act), which ruled the industry during the second part of the 20th century and the first decade of the 21st century. This regulation concentrated the regulatory power of the industry in the figure of the President. Mexican presidents were able to decide who could or could not own television channels and radio stations and, as a consequence, to control what could or could not be broadcasted through these media systems. Thus, throughout most of the 20th century, television and radio systems were appendixes of Mexican governments.

However, this order of things, at least in a legal dimension, changed in 2014 when legislators approved amendments to the Constitution and created a brand-new act to regulate broadcasting and telecom operators. Mexican lawmakers amended the articles six and seven of the Constitution. These amendments included granting the right to freedom of thought, opinion and expression, as well as the right to receive and produce information. Moreover, the Constitution grants that all Mexicans should have universal access to broadcast and telecom services. Up to now, the universal access to telecom services is far from being satisfied.

Moreover, in 2014, legislators repealed the Radio and Television Federal Act and replaced it with the *Ley Federal de Radiodifusión y Telecomunicaciones* (Broadcasting and Telecommunications Federal Act). The new regulation brought new rules that meant to change the media landscape in four main elements—among other things: First, the new act cancelled the Presidential power of deciding who could own broadcasting and telecommunication systems and created the *Instituto Federal de Telecomunicaciones* (Federal Telecommunications Institute), which is now in charge of regulating these industries; second, it limited economic concentration specifying that companies and holdings cannot own more than 50 percent of the market share; third, it allowed foreign investors to participate in the broadcasting and telecommunications markets; fourth, it modified the taxonomy of media ownership by recognising commercial, public, and social types of media ownership. It is too soon to evaluate the long-term impact of these reforms. However, it is clear that the broadcasting and telecommunications industries have barely changed since 2014. As of 2018 there are no laws that regulate online content in Mexico and the new administration that came into office in December 2018 has not offered any information or signal of change.

Accountability systems

Historically, the narrative that has prevailed in the relationship between public institutions and media systems has been one where media self-regulation acts as a way in which media owners, publishers, and journalists could be accountable. However, in reality, during most parts of the 20th century federal and local executive branches had the power to regulate and modify the operations of media institutions. In the self-regulation narrative, there is no shared ethics or deontological code that guides media systems and journalists, nor national or local organisations of media owners, publishers, or journalists that have clear objectives towards self-regulation.

Since the 2014 legal reform to the Constitution and the publication of the Broadcasting and Telecommunication Federal Act, broadcasters are obliged to have an ombudsman or public editor. This ombudsman should be in charge to stay in touch with the TV channel or radio station, to receive the observations, criticism and petitions from viewers and listeners, and to mediate between the public and the media institution. Each TV channel and radio station has the right to designate the public editor and to develop its own ethics code. Up to now, four years after the reform, there is no public information available to know how many radio stations and TV channels have an ombudsman.

Finally, during electoral campaigns, the *Instituto Nacional Electoral* (National Electoral Institute) has the power to sanction

media institutions, political parties, and candidates who do not follow the electoral laws and guidelines. Mexican laws prohibit broadcasters to commercialise ads and editorial content during an election. This means that political parties and candidates cannot purchase ads for radio and television nor interviews or native or sponsored content. The National Electoral Institute assigns to each political party and candidate a certain amount of radio and TV ads during the campaign, which media institutions have to broadcast as part of what they pay to the Mexican State for using the electromagnetic spectrum. Thus, if any media institutions sell time for broadcasting ads or news to any political party, candidate or layperson, the National Electoral Institute has the power of sanctioning these organisation and persons.

Regulatory authorities

The aforementioned Constitutional reform and the publication of a new law for regulating broadcasting and telecommunications in Mexico included the creation of the *Instituto Federal de Telecomunicaciones* (Federal Telecommunications Institute), which became the regulatory authority for these sectors. The institute is autonomous, which means that it has its own budget and that it can regulate these sectors without the interference of the executive branch. The primary objective of this institution is to supervise and regulate the broadcasting and telecommunication uses and services. Moreover, it has the goal of encouraging a fair competition among the companies that provide these services. An important note is that this institution does not regulate content, discourses or speeches in the digital sphere. In five years, the institute organised the transition from an analogical television system to a digital one, the bidding of one national television network and of 32 regional channels, as well as the bidding of 145 new radio stations.

Sources

Laws and regulations

- [Constitución Política de los Estados Unidos Mexicanos](#) (Political Constitution of the United Mexican States)
- [Ley Federal de Imprenta](#) (Press Act or Publishing Act)
- [Ley Federal de Radiodifusión y Telecomunicaciones](#) (Broadcasting and Telecommunication Federal Act)

Institutions

- [Instituto Federal de Telecomunicaciones](#) (Federal Telecommunications Institute)
- [Instituto Nacional Electoral](#) (National Electoral Institute)
- [Secretaría de Gobernación, Dirección General de Medios Impresos](#) (Secretariat of the Interior, General Directorate of Printed Media)

Education

Universities and schools

Journalists are not required to have a license but are expected to have a university degree. The preferred choice for journalists is related to Media and Communication subjects, but other degrees do not restrain from the professional practice. As a professional degree, journalism is normally taught at a higher education level, frequently as part of a broader Communications degree.

According to the 2016-2017 registry of the National Association of Universities and Higher Education Institutions (ANUIES), there are 391 higher education schools that offer a Media and Communications and Journalism degree. Nearly a fifth of those institutions are affiliated to the National Council for the Teaching and Research of Communication Science (CONEICC), a civil association dedicated to the study of communication. Membership to the Council is not compulsory but gives an idea of the importance and seriousness of the institution in question. The Labor Observatory, a public agency, considers different areas that comprise the broad subject of Communications and qualify as part of this expertise, such as: Communication Science, Organisational Communication, Political Communication, Mass Media, Journalism and Photojournalism. For its part, ANUIES also includes degrees in public image, public relations, entertainment management, and social communication as part of the broader subject of Communication.

According to the same institution, the student roll in the country for these Communication programs in the 2016-2017 school year was nearly 69,108, of which nearly 60 percent is female. Mexico City is the federal entity with the most institutions offering a communications or journalism degree, with 40 institutions, followed by the State of Puebla (36) and the State of Mexico (31), capturing together 48 percent of the total toll. The three institutions are located in the central part of the country, revealing the centralised nature of the media industry. Depending on the institutions, degrees last three to five years of study, although it is most frequently a four-year degree. Graduation rates are low, as only 16 percent of the students get their final certificate. Universidad Iberoamericana in Mexico City is the first institution in Mexico to have offered a Communications-related degree since 1960.

Professional development

According to the Labor Observatory, the number of professional communicators covering all areas of expertise in the country is of around 194,784 -ranking 15th among the 67 professional degrees in the country, but it is only the 28th best-paid career in the national labour market. Gender distribution of working professional is nearly even, with 51 percent of professional communicators being male and 49 percent female in the first third of 2018.

There is a high concentration of professional communicators in central Mexico, as half of the professional graduates work in this area. Up to 78.6 percent of the workforce in communication works for the private sector and 21.4 percent in public organisations, while 78.2 percent are subordinated employees and only 5.6 percent employers. However, only one in four actually perform tasks closely associated to their Communications degree.

With respect to postgraduate options, in 2017-2018 there were 35 programs including Master programs, Doctoral programs and Specialties according to ANUIES. Of those, 25 are Master programs in some area of Communication, two in Journalism, one in Scriptwriting, four PhDs in Communication and three Specialties. One in three out of the 664 postgraduate students in Communication is studying in Mexico's capital. The Universidad Iberoamericana in Mexico City offers the longest-standing postgraduate program in Mexico, a Masters in Communications, launched in 1976.

However, ANUIES' list does not include two key institutions that offer practice-oriented Masters degrees in Journalism: Escuela Carlos Septién (Masters in Political and Financial Journalism, respectively) and Master in Journalism and Public Policies, from the Economics School CIDE. In fact, Masters in Journalism as such are much scarcer than Postgraduate degrees in Communication, showing the lack of professional and educational development after graduate education.

There are other programs that contribute to professional development and training for journalists. One of such programs is Press and Democracy (PRENDE), launched in 2004 and hosted by Universidad Iberoamericana Mexico City to contribute to the professionalisation of journalists. As the only of its kind in the country, PRENDE offers each semester journalism fellowships to short and mid-career journalists from all over the country. Fellows are granted free tuition fees to study the

courses they wish during their semester time, plus additional free workshops, talks and seminars. PRENDE fellows specialise in a particular subject each semester, such as Science, Sports, Human Rights, Culture and so on. PRENDE has a registry of more than 250 fellows in its first 14 years of existence, and was at first funded by international donors. The University is now entirely self-funded. Frequently, universities also run a vast range of diploma courses targeted to journalists, examples of 2018 include Justice and Law Diploma at UNAM, Electoral Reporting Diploma at Universidad Iberoamericana, or Investigative Reporting Diploma at CIDE, and so on. The University of Guadalajara hosts the Centre of Training in Digital Journalism, an online platform that offers courses and diplomas.

Another opportunity for professional development is the Knight Center for Journalism in the Americas, within the University of Austin, Texas, that offers useful online courses, seminars, talks and publications that are open for journalists in Mexico, particularly those near the border. Other international organisations also offer development and training opportunities for journalists in Mexico, such as the International Center for Journalists.

Media Development Organisations

Journalists themselves have organised coalitions and training programs and initiatives. The association *Periodistas de A Pie* also offers journalism training, as are other organisations that offer annually events aimed at training and development such as hackathons, workshops, courses and so on. One example is *Quinto Elemento Lab* (Fifth Element Lab), an initiative led by veteran and respected professionals aimed at funding and mentoring investigative journalism projects across the country. Another initiative is *Chicas Poderosas* (Powerful Girls), a female-based collective that offers digital and new media skills and leadership training to facilitate professional mentorships, and to provide fellowships to girls so they can learn from innovative news and media organisations.

Another initiative is the Latin American Net of Young Journalists, headquartered in Mexico City. This organisation, launched by *Distintas Latitudes*, a digital platform of political and social analysis, links digital mentors of key organisations to young, promising talent from the region to help them develop their projects through online courses and training. This initiative also organises an annual Forum on Digital Media where journalists from all over the continent discuss their challenges and present their work, and also runs seminars and workshops by senior digital journalists. Another coalition is Hack and Hackers, a collective aimed at bringing together coders and technology experts and journalists in order to use technology to find and tell stories in innovative ways.

In the private sector, Taller Arteluz offers a vast range of courses and workshops for journalists and communicators. In the non-for-profit sector, NGOs such as Social TIC offer data, digital and security training to journalists and social activists, whereas Factual links mentoring initiatives to investigative projects.

Sources

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- [Centro de Formación de Periodismo Digital](#)
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- [CONEICC](#)
- [Distintas Latitudes](#)
- [INEGI](#)
- [Observatorio Laboral](#) (OLA)
- [Periodismo CIDE](#)
- [Universidad Iberoamericana Mexico City](#)

- [Programa Prensa y Democracia](#) (PRENDE)
- [Quinto Elemento Lab](#)
- [SocialTic](#)
- [Taller Arteluz](#)

Telecommunications

Mobile network ecosystem

Regarding ownership, the Mexican mobile network ecosystem was built upon the base of the landline network that operated during the 20th century. Until 1990, the landline network was a state monopoly, which received the name of *Teléfonos de México* (Telephones of Mexico) and was widely known as TELMEX (an acronym of the name). By the end of the 20th century, the Mexican government started to privatise much of its state monopolies, and during the presidency of Carlos Salinas de Gortari, TELMEX was sold to Carlos Slim Helú. However, Mexico did not open this sector to other investors, and TELMEX became a private monopoly. When technological convergence began to unfold, TELMEX expanded its operations to the mobile communication business through TELCEL, which has been offering services in the telecommunications realm. Gradually, since the 2000s and especially after the 2014 Constitutional reform, the telecommunications sector began to have more competition and many national and international companies have started to offer services. However, as is demonstrated in the following sections, America Móvil, which owns TELMEX and TELCEL, is still a dominant company that controls telecommunications in Mexico. Drawing from the previous historical background, Mexico is in the process of building a robust mobile network for telecommunication services.

Company profiles

According to the OECD Telecommunication and Broadcasting Review of Mexico, there are nine mobile network operators (America Móvil, AT&T Mexico, Axtel, Fish Mexico, Megacable Group, Grupo Televisa, Telecomunicaciones indígenas comunitarias, Telefónica, and Totalplay) and eight mobile virtual network operators (May Tiempo, Maxcom, Qbo Cel, Teligentia, Virgin Mobile Latin America, Weex, Flash Mobile, and Megatel).

Although there are many companies providing telecommunication services, the market is concentrated in three significant firms: 1) America Móvil, which concentrates 64 percent of the mobile phone subscriptions market and 71 percent of the mobile broadband market. This holding is owned by Carlos Slim's Caro Group and is composed by Telmex, Telcel, and Teléfonos del Noroeste or Telnor. 2) Telefónica, which concentrates 23 percent of the mobile phone subscriptions market and 14 percent of the mobile broadband market. Telefónica is a Spanish multinational broadband and telecommunication services provider and owns two companies in Mexico, Grupo de Telecomunicaciones Mexicanas and Movistar. 3) AT&T Mexico concentrates 10 percent of the mobile phone subscriptions market and 12 percent of the mobile broadband market. AT&T is a publicly traded American multinational company that provides broadband and telecommunications services. In Mexico it owns Unefon, Iusacell and Nextel.

It is relevant to mention that two of the three major telecommunication providers in Mexico are foreign companies. This foreign investment is a result of the above mentioned Constitutional and legal reforms that allowed non-Mexican companies to invest in the telecommunication sector—an action that was forbidden during the 20th century.

Main trends

The telecommunication sector is in the process of constant change, due to the recent legal transformations. The 2017 evaluation of the OECD to this sector in Mexico is positive. According to this organisation, after the legal reforms in the country, investments grew, the prices of telecom services went down, and the market was improved by the arrival of new companies that started to offer mobile communication services. However, it is essential to state that the Mexican telecommunication sector is still highly concentrated and dominated by America Móvil.

The 2018 Study on the Habits of Internet Users in Mexico contains data regarding Internet usage. According to this report, 51 percent Internet users are women and 49 percent men; 16 percent are persons that range from 6 to 11 years old, 18 percent from 12 to 17, 17 percent from 18 to 24, 19 percent from 25 to 34, 14 percent from 35 to 44, 9 percent from 45 to 54, and 7 percent from 55 onwards. Of the people that have access to the net, 76 percent reports using a mobile phone to surf the web, 66 percent laptop, 51 percent tablet and 39 percent a desktop. Up to 53 percent say to use online banking, 22 percent say report using the Internet for selling things, and 54 percent for buying online.

Moreover, the 2018 Media and Devices Usage Report is a survey sponsored survey by Millward Brown and Televisa. In this study, people reported having subscriptions to online entertainment platforms such as Netflix (59 percent), Claro Video (12 percent), iTunes (9 percent), KLIC Cinépolis (9 percent) and Blim (6 percent). The same study explains that 80 percent of the people that reported being regular users of the Internet for buying products, used PayPal, 56 percent a debit card, and 44 percent a credit card. These trends have impact and effects on various social levels, yet there are no critical reports about them and most of the information available comes from governmental sources.

Mobile coverage

Although the telecommunications industry is growing, Mexico still faces a sharp digital divide, and many people and native populations do not have access to this kind of services. In 2017, the National Institute of Statistics and Geography reported that 17,397,850 homes had Internet services, which means that only 52 percent of the Mexican homes are plugged to the net. According to the Federal Telecommunications Institute, 42 percent of the Mexican homes had broadband services—which is less than half of the population. The National Institute of Statistics and Geography also reported the number of persons who use the Internet in Mexico. In 2017, 71,340,853 people reported to have used the Internet in the last month. This data shows that 57 percent of the population considers itself as an Internet user.

The aforementioned data suggest that Mexico is a country that is far from achieving a universal access to the Internet. There are many elements that structure this unequal distribution of the communicative resources. According to the IFT, 62 percent of men and 58 percent of women have access to the Internet. Those persons who have the highest income have 40 percent more chances than the rest of the population of being regular Internet users. Moreover, space also determines Internet access. Whereas in the Northern states the population have more chances of being connected, in the Southern states the chances decrease.

Mobile ownership

The National Institute of Statistics and Geography reported that 73 percent of the Mexican population reported to have a mobile phone and from that universe, 76 percent reported to own a smartphone. In other words, only 55.9 percent of Mexicans own a device capable of using broadband services.

According to the Federal Telecommunications Institute, by the end of 2016, there were 111 million mobile subscriptions - in a

country of 120 million inhabitants - from which 84 percent pertain to prepaid plans and only 16 percent to post-pay/contract plans. Moreover, from all the mobile subscriptions, 75 million were connected to broadband services. In other words, the overall mobile network teledensity is 91 subscriptions for every 100 inhabitants and, when talking specifically of broadband, the teledensity is 61 broadband subscriptions for every 100 inhabitants.

However, the previous information should be contrasted with other data: Mexico has a dishomogeneous population; the distribution of wealth is unequal. For example, the mobile phone teledensity in Mexico City and the northern states of Baja California and Nuevo León is of 126, 118, and 111 subscriptions respectively for every 100 people. However, in the southern states of Chiapas and Oaxaca, the teledensity was 59 and 54 mobile subscriptions for every 100 people. Regarding the broadband teledensity, there are similar patterns: whereas, according to the Federal Telecommunications Institute 2016 Statistical Yearbook, in Mexico City there were 97 broadband subscriptions for every 100 people, in Chiapas, there were only 28 broadband subscriptions for every 100 people.

Sources

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Innovation

Landscape analysis

The technology and innovation industries in Mexico are in the making and are not as developed as in countries of the global North. These industries have been developing in specific states of Mexico, such as Jalisco, Querétaro, Yucatán, and Tabasco. These states have created infrastructure and economic incentives to capture foreign investors in order to innovate and create new technologies.

Guadalajara, capital city of Jalisco, is a paradigmatic case that can illustrate the current state of innovation. Since the end of the 1990s, the local government has created different strategies to bring investors to Mexico and participate in the tech industries. In a first phase, the state became a hub for manufacturing electronic devices and companies such as IBM, HP, Kodak, Philips, Siemens, Texas, Xerox, Motorola, NEC, CP Clare, Electronics, Pentax Mexicana which established in Guadalajara. In that time, Guadalajara was named as the “Mexican Silicon Valley”.

Then, in the 2010s, Guadalajara has transitioned to become a hub for innovation. In recent years, the federal and local governments have created strategies to build a hub for the creation of new technologies and innovation. According to a *Washington Post* article, “Is Mexico the next Silicon Valley? Tech boom takes root in Guadalajara”, “Around US\$120m has

been invested in nearly 300 Guadalajara startups since 2014, much of it coming from venture capital in the United States. [...] Jalisco annually exports US\$21bn in tech products and services, according to the state's innovation ministry. Jalisco has 12 universities, including the prestigious Tecnológico de Monterrey, creating an IT funnel of 85,000 graduates a year."

Moreover, Guadalajara is the host of conferences and workshops for innovation, such as Campus Party, Talent Land and various hackathons. These conferences attract young people with digital skills, white hat hackers, and professionals. However, as explained before, Guadalajara illustrates the case of an incipient industry and cannot be generalised to the whole country.

Profiles of main tech parks, accelerators, hackathons

The biggest project of the last two federal governments, has been the development of the Creative Digital City in Guadalajara. This project has been defined as "a modern and interconnected stage where talent and creativity breed knowledge, boost the use of new technology and improve the quality of life in the Guadalajara Metropolitan Area", moreover, the Creative Digital City "concentrates creative industries such as studios involved in the production of film, television, video games, CGI, interactive media and mobile apps, among many others, thus positioning the state as a productive centre that is relevant to a sector that constitutes the vanguard of global economy today." However, this project has not been successful due to problems of political corruption. Creative Digital City has received public funding and, after several years of development, it has shown minimal results. To our best knowledge, there are no innovation and tech projects related to journalism and information in the Creative Digital City.

Sources

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Traditional forms of communication

Summary

As explained in a previous section (ie, Television), the most popular and extended communication network in the county is the TV network and, according to a 2010 survey of the *Consejo Nacional para la Cultura y las Artes* (National Council for Culture and the Arts - CONACULTA), 90 percent of the Mexican population expressed to be regular TV viewers. This survey, which is old but the only available for the purpose of this section, also offers information about cultural consumption through other communication systems. For example, only 33 percent of the population have attended a dance performance, 54 percent a concert, 32 percent a play in the theatre, 55 percent a museum, and 55 percent a library. These numbers show how important and dominant is the television as a communication system, when compared to other forms of communication.

Sources

Conclusions

Conclusion

The media landscape in Mexico is vibrant and heterogeneous but also drags old inertias that hinder and constrain the democratic functions of the media in many ways. Media houses were historically deeply tied to political powers through clientelism and collusion revolving around the discretionary allocation of political advertisement, a key source of income for the media. This continues to be a challenging issue for freedom of expression and access to information, since traditional media are eager to use news coverage as commodity in exchange for these benefits. Current legislation has a great challenge in this regard, and NGOs and citizens require to continue their checking of initiatives on these matters. There is still high concentration in the broadcast and telecommunications sectors in times of declining audiences. Newspapers continue to struggle to survive financially, and recent layoffs suggest a crisis in the sector. Independent digital media and widespread initiatives of collaborative work are filling the gap left by traditional media in conducting and publishing investigative and innovative work. Most of the award-winning work in watchdog journalism has been collaborative in nature. To counter their traditional poor working conditions and anti-press violence, journalists and activists have organised themselves in extraordinary ways for security, safety and professional development.

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