From freedom... to where?

Four decades of journalism in Spain

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Introduction

It is undeniable that Spain has changed. In fact, almost everything is different from the way it was four decades ago. But has journalism changed as well? The answer to that question is far from obvious: maybe it has, maybe it hasn't. Or to put it another way, not all the changes that have occurred have stayed with us, and some have even shown a disturbing tendency to reverse themselves. Perhaps the biggest uncertainty hinges on the extent to which the media is really able to adapt and respond to the changing realities that have characterised our society's evolution over the last 40 years, especially during the final phase that has brought us to the present day. A logical place to start analysing this question is with the role the media has played in the past, and continue up to the position it holds in our society today, before considering the ways in which it is confronting a future that may or may not come to pass.

Is the influence of the media more powerful than ever? That question has been asked so often, at so many times in history, that it's difficult to say what the right answer is. The special significance of the media can only be considered as something quite current, or at least something quite recent, because within the entire span of human history it actually a very young

phenomenon. It has really only been in existence for about 150 years, compared to the 7 million[1] years (?) or so that we have been inhabiting this planet. Nevertheless, if we focus on our more immediate surroundings – Spain – it would seem quite valid to answer that question in the affirmative. We are living in times in which the way we assess people is based more on how they seem or what they say than on what they do or who they actually are, which ends up being largely what the media suggests or reports. This increasingly takes the form of reproduced words that someone has spoken... in some cases regardless of whether they actually said them or not. What has come to prevail is a sort of journalism of quotations, where the job of the *professional* is simply to make use of a pen, microphone, or camera to record the words of some protagonist who is directly or collaterally involved in every current event, act, or issue. There is also a paradox or two – as there are in virtually everything – in the obsession with *appearing* and projecting a public image coinciding with the simultaneous desire to hide substantial aspects of reality, as the same protagonist attempts to present to the rest of us what is ultimately a fake image, even if it is not always called that.

During the last four decades, Spain has undoubtedly experienced a very unique history, and the media, that is to say journalism, has as well. The country has made a successful transition from a prudish authoritarian regime to a democracy comparable to those predominating in the rest of Europe. However, here at the end of the second decade of the 21st century, signs of fatigue are

1 Yuval Noah Harari, *Sapiens.* Debate, 2016.

beginning to show, with serious indications that there is a need for action – and the will – to give it all a good updating and, in the end, revitalisation. Given this reality, it does not seem particularly audacious to hold more or less the same belief in relation to the media landscape, the role of the media, and the profession of journalism. This is so much the case that the undeniable protagonism of Spain's political parties, shared with or supplemented by the entities reporting the news, is becoming distorted at almost the same time. Both groups now confront a critical strategic dilemma: whether to carry on with their traditional structure, at the risk of further deterioration even to the point of irrelevance; or to take on the challenge of a profound regeneration, but at the risk of choosing the wrong route for transformation. Of course, as tends to occur with any process of change, reality will not be constrained by their decision-making processes, but will at the same time be subject to the course of development selected or adopted by society as a whole.

The scenario into which the media and the profession of journalism have been propelled, and which will continue to unfold, is already marked by elements that are to some degree exogenous, such as technological evolution and the behavioural tendencies and needs of society as a whole. This includes, as in the case of strictly political aspects, the *intrusion* of new participants who are not in general subject to traditional codes of conduct. In short, the *habitat* in which media sources are called upon to perform their duties is not the same as the one that existed 40 years ago, and this is largely the reason behind the critical outlook that now prevails. Far from being coincidental,

this is a direct result of the developments that have taken place over the past four decades, which will be the subject of the analysis presented here. This is a history that, as will be explained, has been marked by decisions both good and bad, and by responses to the existing social dynamics that have been both appropriate and erroneous. It is a history that, in the end, it would not be entirely inappropriate to simplify as a transition from a hopeful rebirth to a future that, in the best of cases, must be considered uncertain, without sufficient data available to even allow predictions with a minimum degree of probability. The recovery of the freedom of the press in Spain opened up a horizon full of hope, but now that hope is perceived as threatened or at least drawn into question, becoming the orphan of so many protections and guarantees that were thought to be assured and immune to any attempts at perversion. Little by little, however, it is becoming apparent that although those freedoms were very difficult to achieve, they are also very easy to lose, and much more difficult to recover.

In contrast to assumptions about the determining role that journalism, and particularly print journalism, should at least in some degree play, the field has become immersed in a profound crisis, with no clear answers as to how or when it will be able to rise above this situation. This far-reaching crisis not only affects economic and business-related factors, but also, and above all, it has at its heart matters of social perception and the banalisation of the paramount traditional attributes of journalism: reliability and credibility. Good evidence of this can be seen in the fact that journalism tends to be given the same credibility regardless of the medium by which it is distributed, no matter what the source

may be, whether by means of traditional media or via variations of the *social network*, which must now be considered as established rather than as emerging. To draw attention to another paradox, which ultimately is not a paradox at all, it is clear that people will tend to believe anything they read or hear, as long as it agrees with, reaffirms, or supports their previously held beliefs, well beyond the level of trust the source of that information may merit, even if little or none. The explanation may come from the fact that, although the credibility given to those who report professionally is fairly paltry, much less is attributed to the topmost or most prominent strata of the social structure.

Surely part of the reason behind this rather disagreeable assessment of the present is that, for some time now, there has been a revival of a sort of mythologising of the role of the media as it existed in an earlier era. In the specific case of Spain, the period that stands out above all is when democracy was reestablished in the country, a period referred to as the Transition. There has never been full agreement regarding the role that the media played, but nobody denies that it played a role and that it was by no means a marginal one. Regardless of what that role may have been, what also seems beyond any doubt is that those years coincided with the media's most recent phases of splendour, and it is perhaps for that reason that views of its relative status today have been more negative than they should actually be. In the end, what emerges as indisputable is that the media landscape of today bears little resemblance to that of yesterday. The transformations have been profound, and they have affected almost everything.

Whether the role played by the news media in society today is the role it should be playing remains a matter of debate, and often a matter of controversy. It is accepted that the media is an essential part of any democracy, but there is no small amount of suspicion – even mistrust – in relation to its independent nature, or to put it another way, in what lies behind its ownership. Publiclyowned media outlets have traditionally commanded respect, even though they have very frequently been used in a partisan manner by the governments in power, but there is a growing conviction that those under private ownership also respond to interests beyond that of the public's right to true and reliable news and information.

In Spain, a key factor is the practical disappearance of the figure of the editor and companies with a shareholding structure reflecting a dedication exclusively to publishing. This is something that has coincided, regardless of the nature of the actual relationship, with a new precariousness for professional journalists and a loss of power for editorial staff, to the benefit instead of the administrative-financial-commercial managers. As such, the progressive submission of news reporting to the interests of political parties or governmental interests, something long attributed to publicly owned media outlets, has migrated to the similar subjugation of the private media to interests beyond those strictly pertaining to information. This is a situation to some degree fostered by the media outlets themselves, as they maintain their societal opacity in very sharp contrast to the perennial calls for transparency that tend to be focused on other social actors, above all those involved with governance and other

spheres of public concern. And for whatever reason, those media outlets have experienced a progressive proliferation of readers and viewers, which has perhaps caused the business structures of many of these organisations to become incongruous, to the point of being unsustainable. They were conceived based on circulation figures from a particular time, but are now vulnerable to being overcome by reality. Put another way, revenues have become insufficient to support structural costs, resulting in losses for the majority of traditional media operators.

Intuitively this issue is pertinent to the print media, but it is also clearly expanding to affect all media through which journalism is exercised. On one hand, this is due to a shift towards multimedia approaches that has caused production of various types of media to be grouped under the same ownership and management, partly represented by increasingly wellestablished online sources, but no less so by television, which has tended to blur the differentiating boundaries between news reporting and entertainment. That medium has also been affected by the impact of a regulatory system that clearly subjugates the radio and television sector to a regime of government concessions and licences awarded under conditions of nefarious discretion.

Increasingly, any analysis of the recent history of the media, and the resulting efforts to predict its future, must differentiate among its different variants in the form of print, audiovisual, and online sources. During recent years – that is, the four decades under analysis here – many aspects of the respective histories of those media have diverged, just as they now differ in the present and will undoubtedly continue to differ in the future.

Nevertheless, there is a shared point of connection: all of them, although perhaps some more than others, are being affected by very substantial changes. And these changes have reached a point at which some of these media seem to be seriously threatened, if not with complete disappearance, at least with relative losses in terms of their influence in society, and as a result, the loss of their reputation as well.

In contrast to the more widespread belief that the crisis in the media is a matter involving just printed newspapers and magazines, the view from inside the sector suggests the need for a much broader analysis. This makes it worth the effort, which could be said to be as urgent as it is necessary, to take a deeper look at the structural elements of the industry: from the configuration and dynamics of its companies to the strictly professional side of the business affecting journalists and others involved in the production process.

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I. Starting all over

Franco is dead! Some had imagined announcing it so many times, while everyone else had imagined hearing it, but when it actually happened, most people had no idea what to do. This was especially true for journalists who, some more than others, had become accustomed to writing with a mixture of restraint and inference, halftruths and double meanings, generally managing to find some sort of compromise between restrictions that, while not entirely eradicating their freedom, did not unconditionally grant it to them either. In essence, this was nothing different from the situation that had become dominant in society as a whole. So, when the stone was lowered into place atop Franco's tomb, near the altar of the basilica at the controversial Valley of the Fallen monument in the rather dismal district of Cuelgamuros a few kilometres from Madrid, to some degree, everybody sensed and, above all, hoped that a new era was about to begin.

To be honest, it did not really feel like freedom was arriving. The endless weeks of General Franco's illness had brought back the worst extremes of information obfuscation, including halftruths and an enormous amount of concealment. As ironic as it may have sounded then, and especially now, his regime hardened its practices as death approached the man who, for almost four

decades, had held almost all the power in his own hands. There is no better evidence of this than the cruel and bloody executions of September 1975, but there was also a series of denouncements against the media and even the occasional confiscation and temporary shutdown of periodicals that those in power deemed troublesome. And this is why, if truth be told, those opposed to Francoism mainly relied on the few publications that dared to walk a fine line, taking risks that would periodically find them brought before the courts, with their operations suspended. There were not many of these. In fact, except for magazines such as *Triunfo* and *Cambio 16*, there were scarcely any options available to readers that would dare to transcend the official version of the *truth*. Of course, those who worked for publications of that type celebrated when Franco's death finally came in November of 1975, confident that the doors to freedom of expression and information were progressively opening. But at the same time, this was never entirely clear: the future appeared as uncertain as it was hopeful, and not at all exempt from the risk of regression.

The final years of Franco's regime had not exactly given much reason for hope in terms of freedom. Entirely to the contrary. The few media outlets and professionals that dared to push the envelope of the regime's tolerance level frequently ran up against the straitjacket imposed by government entities, if not by the courts as well, which had the effect of encouraging *prudence* among the rest of their colleagues. Risking the associated problems, which ranged from confiscation of publications to administrative fines or court cases, required a healthy dose of audacity, if not recklessness. So, those who were prepared to

take those risks, or who actually had the opportunity to do so, were definitely a minority. There were also threats and even physical assaults from groups referred to rather inappropriately as *uncontrollable*, because everybody knew about their connections to and cosiness with the police or hardliners from the official power structure. In all of this, the essential information remained hidden from public knowledge. There are few examples better than the phlebitis that seriously endangered the health of General Franco in the summer of 1974. Or, going a little further back, the assassination of Admiral Carrero Blanco, who was then Prime Minister of the government, on 20 November 1973. In both cases, the official version prevailed almost unadulterated and unsupplemented, and the information that was added was late and inaccurate, although the reports and talk heard among the people, the accuracy of which never ceases to amaze, were much closer to the truth.

The attack that took the life of Luis Carrero Blanco occurred at around 9.30 in the morning, but the event was not officially reported until noon, with the TVE (the Spanish national broadcasting service) news broadcast delayed several minutes. Even then, the information released was only partial, and concealed the presumed authorship of the violent Basque separatist group ETA and, even more, the tensions the attack precipitated within the government. The Deputy Prime Minister at the time, Torcuato Fernández Miranda, was inaugurated as the new acting PM. He faced enormous obstacles in imposing his command upon military authorities who wanted to declare a state of emergency and even launch reprisals against members of the political left and supporters of Basque independence. These

are events that would not fully come to light until years later.
The public was also partly kept in the dark about General Franco's first serious illness, an acute case of phlebitis that caused his first known hospitalisation and activation of a transfer of his powers as head of state to Prince Juan Carlos. In fact, Franco's state of health was virtually treated as top secret by the government, a subject considered untouchable by the media. This was despite his clear physical decline that was obvious to anyone during his public appearances, with images from these events tightly controlled by the public news reporting services: the EFE news agency and TVE. And it didn't take a medical degree to see that the rumoured – but never admitted – Parkinson's disease that was further compromising Franco's health was advancing inexorably. There were numerous stories suggesting that he was in a quasi-catatonic state during meetings of his Council of Ministers, as well as during some of the audiences held with the few foreign dignitaries who were granted official visits to Spain. As time went on, it became clear that these accounts, initially labelled as gossip, were in fact the absolute truth, and this often gave rise to speculation on how and why so many people had been able to learn of these circumstances without the intervention of the media.

What was undoubtedly the culmination of all this was the absence of news reporting that surrounded the final months of 1975, particularly between the time of the executions by firing squad in the month of September and the days following Franco's death. Just as in the case of the two earlier events described above, anyone who wanted to know what was actually happening, and who was able to do so, had to resort, among

other sources, to shortwave radio broadcasts from Radio España Independiente[2], popularly referred to as *La Pirenaica*. This also led to no small amount of confusion, since it was that broadcaster, based in Bucharest, Romania, at the time, which announced General Franco's death prematurely on several occasions. There was also no lack of skilful efforts to obtain information via foreign broadcasting from the British Broadcasting Company (BBC) or Radio France by those who were able to gain access to their signals. But despite all this, in reality the progression and eventual conclusion of Franco's terminal illness ended up being reported in a more transparent manner than would be expected given the corresponding history and context. Although it's true that the release of *medical reports* as profuse as they were opaque for those uninitiated in clinical medicine, which the public nevertheless followed with great anticipation, were given little credibility, and there was no lack of rumours of all types suggesting, among other possibilities, that Franco's death had already occurred but had not been announced. In fact, information revealed later has led to the impression that almost all the health-related news reported about Franco in real time had been true. On the other hand, the complete absence of information about what was going on in terms of the ins and outs of governmental power, and by extension, events involving the military, is another matter. Much of this, beginning with the tensions revolving around *provisional* assumption of power by Franco's successor Prince Juan Carlos and the manoeuvring taking place to the contrary by Franco's direct

2 Linked to the Communist Party of Spain (PCE), it began broadcasting in Moscow in the Soviet Union in 1941, under the promotion of Dolores Ibárruri, Pasionaria, then moved to Bucharest, Romania, in 1955 until eventually disappeared in 1977.

family members, remained unknown until years later. What will never be known for certain, however, is the degree to which knowing that information, at that time, would have calmed or amplified the generalised fear that people were feeling because of their uncertainty about what would happen *the day after*.

This is not the proper place to reminisce about the uncertainties, risks, and sudden changes that characterised the years immediately following the end of Franco's regime, which have now become the part of Spain's history referred to as the Transition. However, it is the proper place to discuss, albeit briefly, the role played during those years by the news media. That role was undeniably a decisive one, and this can be said without the need to resort to any sort of corporatist perspective intended to magnify its contribution. Not surprisingly, much has been written and discussed about the role of journalists in those years, mostly suggesting excessive degrees of closeness and complicity, but in any case, provisional and therefore reduced over time to depict scenarios of greater normalcy.

As always, the relationships among the media, its professionals, and those holding or aspiring to positions of power – regardless of what type of power it may be – have tended towards confrontation. Somebody once defined news as 'any story the person involved would not want to see published,' and although that statement seems exaggerated, and probably is, it is not too far from expressing the actual dynamics of the situation. This is undoubtedly the reason for the emphasis that has been placed on the appearance of *closeness* that existed between the socalled political class and journalists during the crucial years of the

Transition. Although they tried to remain as close to the truth as possible, it must be acknowledged that many professionals adopted, or believed in adopting, a good dose of protagonism, with the conviction that what they wrote, whether news or opinion, largely determined the course of events. Whether this was actually true or whether it contains a generous dose of pretentious exaggeration is a matter of opinion, but perhaps it is fair to say that even if not entirely accurate, it was at least partly so. What can be confirmed is that aside from certain exceptions, the media was almost unanimously in favour of the recovery of freedoms, establishment of democracy, and of course, integration into and acceptance by European society as a whole. Nevertheless, this didn't pose an obstacle to a situation in which each media outlet began, increasingly emphatically, to align itself with one of the competing political options, although with a higher propensity towards those more centrist in their outlook – whether right or left – than towards the more radical versions.

Without a doubt, the culmination of all of this took place on 23 February 1981, when Lieutenant Colonel Tejero and a group of civil guard officers stormed into the Congress of Deputies, Spain's lower house of Parliament. The occasion was the second session on the subject of investiture of Leopoldo Calvo Sotelo after the abrupt resignation of Prime Minister Adolfo Suárez. Though its significance was enormous, the details behind that assault on power were definitely not clear at the time, nor were they ever completely understood even later. However, immediately afterwards the event was interpreted as a rather confused attempt at a fullblown *coup d'état*, and in view of this, much of

the media and many of its professionals opted to defend the recently established democratic system, which was now reinforced by Spain's new Constitution. There were certainly doubts among some – and fears – regarding the way in which that uprising against the government would unfold, and there were also some notable exceptions who took the side of those attempting the coup. The most significant of these was *El Alcázar*, a newspaper published by the Francoist Federation of ExCombatants, which would be revealed later. It had published a series of coded messages used to mobilise the rebellion that was being promoted – according to some views – by the Generals Armada and Milans del Bosch, among others. It's interesting that, taking advantage of the democratic values they saw fit to insult and attempt to overthrow, this farright newspaper continued to wave the flag of the coup leaders, especially before, during, and after the military trial during which they were sentenced to prison. Finally, beset by financial difficulties and an ongoing loss of readers, the publication disappeared in 1988.

The period that would later be labelled the Transition did not start out well for the press. To a certain degree, the media and many of its professionals did not have a clear idea of how to proceed. They were unaccustomed to the new conditions and surely had an excessive tendency to write *between the lines*, suggesting rather than entirely revealing the actual details, but above all they had to act within the context of a society that was hardly acclimated to a transparent, truthful news reporting dynamic. During Franco's long regime everything was conceived in a manner more like propaganda, and history played out in a way best characterised by its closed and rigid nature. Providing

information was considered as a rarity, and hardly anyone, not even the political leaders, felt even minimally obligated to make their actions transparent in the eyes of the public. However, once the long-awaited transition was established towards a social, political, and economic model more comparable to those existing in the country's European surroundings, it became clear that there was a need to develop new structures for the media, and above all new behaviours and relationships. It was also the case that Spain's judiciary, and in particular certain judges, had a hard time adapting to the new rules, which depended entirely on the greater or lesser degree of enthusiasm, or aversion, they felt towards the recently legalised freedoms. An additional obstacle was undoubtedly the persistence of Spain's 1966 Press and Printing Act (*Ley de Prensa e Imprenta*), which in the absence of any modifications to its interpretation, was on many occasions applied by lowercourt judges as if nothing had changed, and it was only as time went on that this was gradually corrected by the Constitutional Court and Supreme Court, as they began to appreciate that a significant portion of that Act's contents ran contrary to the Constitution. This was so much the case, in fact, that even with Francoism politically disenfranchised, there were still attempts at confiscating certain publications and even banning them, even if those measures were only provisional.

It must be pointed out that the media landscape was characterised then by a highly dispersed print media sector, with many publications having extremely low circulation figures. These were added to a few radio stations/networks that had just appeared after being released from the prohibition against broadcasting news, and which were still required to make a

direct connection with *Radio Nacional de España* (RNE) to broadcast its four daily *news briefs*.[3] There was also a television monopoly in the hands of Radiotelevisión Española (RTVE), which was closely affiliated with the Ministry of Information and Tourism and under its general directorship. This monopoly was undoubtedly the source of the appetite that all government leaders seemed to have for maintaining control over that entity, anchored in the memory that it was the channel through which the political will of a broad swathe of citizens could be largely influenced, with only a minority receiving their news via newspapers, magazines, or even radio stations. Among politicians, the conviction was to some extent established that control over television was an indispensable tool for winning elections…and to a large degree this perspective remains even today. This is regardless of how much that certainty may have become devalued by experience, not just because of the proliferation of audiovisual media offerings, although for that reason as well.

Those years began with a media landscape predominantly anchored in the fundamentals of the political-social system. To summarise, there were about 100 newspapers, almost half belonging to the government's Prensa del Movimiento publishing chain established under the Franco regime, barely a halfdozen independent political magazines, a few radio networks that, as mentioned above, were obligated to broadcast the news produced by the official network – the *news briefs* – and only one television network with nationwide coverage, affiliated with the

3 The compulsory nature of this requirement was repealed on 25 October 1977.

Ministry of Information. The raw material – that is, the news itself – was distributed under the control of two public news agencies, EFE and Pyresa, and one private one, Europa Press, which was linked to the thenpowerful Catholic institution Opus Dei. The content developed was *antiquated*, prudish, and dominated by fear of transgression. It goes without saying that it was difficult, if not impossible, for the timid, weak, or fearful who maintained democratic convictions and plans to get any media coverage, so it is no exaggeration to say that their existence remained practically unknown to the general population. And it must also be said that there was not exactly an abundance of candidates eager to promote the development of new media outlets, even if it would theoretically be possible to take advantage of the broader liberties that had presumably come into existence.

The most notable exception was the newspaper *El País*. Its arrival on 4 May 1976, just six months after Franco's death, was preceded by years of obstacles and difficulties that, in the end, would be decisive in determining its final architecture, which if truth be told, was very different from its initial conception. And, it is important to point out that it hit the newsstands prior to the *de facto* beginning of what we now call the Transition. It was authorised while Carlos Arias Navarro, an advocate of continuing Francoist rule, was still Prime Minister of the government, although the role played by Manuel Fraga Iribarne, the Deputy PM at the time, in making that approval possible was never entirely clear. Perhaps he had been persuaded that it would be a useful tool for supporting his own aspirations of leading the country. The history of that paper, which would end up becoming the indisputable leader of the Spanish press, has been told many

times, but it is worth the effort here to comment on some of the details of its early days, along with the stories of the various media sources from the national scene that would be established later or that would persist from earlier times.

As opposed to the relative explosion of newcomers onto the print media scene, the radio and television stations that made up the audiovisual sector maintained their existing boundaries for much longer, mostly because of the regulations imposed upon them, which would require more than a decade to evolve. This obstacle will be discussed further later on, but essentially it is one that can, and should, be attributed to the status given to them by the relevant legislation as services performed in the *public interest*, which is a situation that continues even to the present day. Because of this, and as a consequence of the perhaps somewhat outdated belief that broadcasting requires the occupation of space on the radio spectrum, also considered to be a *public asset*, radio and TV activities continue to be conditioned by the possession of authorisation, in the form of a broadcasting licence, awarded by the government. The granting of licences has, in general, taken place by means of a competitive tender system that, although ostensibly *open*, has on many occasions been based on specifications that have restricted competition in various ways, and with the resulting decisions showing a high degree of discretion and less transparency than would be desired. The result has therefore been that the audiovisual landscape – as will be explained below – continued to be characterised by an excess of media sources with clearly partisan viewpoints on one hand, and an increasing intensity of concentration on the other, which created a panorama closer to an oligopoly then one

reflecting the free competition theoretically sanctioned by the Constitution now in force.

It should be mentioned, however, that the situation in Spain did not differ so much from those found in the rest of the European Union (EU). What commonly prevailed in almost every European country at the time was the publicly owned radio and television media originally established in the era following the Second World War. It was during that conflict when governments *discovered* the important role that radio, as well as newsreel footage shown in cinemas (the presumed progenitor of television), played in terms of propaganda and opinion formation, all of which was oriented towards garnering citizen support for the war efforts. It was not until the late 1970s and early 1980s when the governments of Europe (although not all of them) started allowing the introduction of private competition, and the first tenuous signs of plurality started to emerge in the industry. Some countries, like France, went as far as to privatise their public systems. Others did so partially, while others, notably the United Kingdom, continued to insist on the theoretical independence of the somewhat mythologised BBC. With all of this, the relationship between political power and television never stopped being tense and subject to conflict, with palpable, recurring efforts at intervention and obstruction, often involving more or less veiled threats against the all-important granted licence. This was undoubtedly based on the superlative relevance that politicians, regardless of their party affiliation or orientation, attributed to whatever was said or seen on television. This treatment, which is very different from that given to the print media, or even radio, and extends to the very recent

addition of Internet broadcast sources, remains largely unchanged today. This is also true in the Spanish market, although here in perhaps even sharper contrast due to the push towards new liberties introduced under the Transition.

Establishing democracy required, among other things, redefining the role of the media. The preeminence of the free exchange of information is and has always been one of the core components of such a system and, in that sense as well as in many others, it represented practically the entire task at hand. The *de facto* disappearance of censorship had already begun to some degree in the final years of the Franco regime, especially compared to what was taking place during earlier periods. However, while the regime itself had clearly slackened its supervision of the media *a priori*, whether by becoming more permissive or perhaps as a symptom of relative impotence, the perennial threat of *ex post* action continued to be held like a sort of sword of Damocles by means of actions that could be taken either via administrative bodies or appeals to the judiciary. In the end, what continued to exist was a potentially repressive apparatus that, to put it gently, was entirely hostile to freedom of opinion and information. And in that situation, as with almost anything else, the idea that sudden changes could take place overnight was hardly realistic. What was more credible and achievable was a transition, in this case one from coercion to respect for freedom. That had to take place through the reform and revision of legal opinions, laws, and regulations, but changes to those texts were not forthcoming, and it had to be hoped instead that earlier restrictions that contradicted the new Constitution would become inapplicable *de jure*, although this is something that would not end up happening

until January 1978, when the Constitution effectively went into force. The arrival of a new era also had to be reflected in the behaviour and attitudes of the central government, derived from the instructions given by that government to the judiciary. The problem was that, at the same time, things were evolving unevenly, and more slowly than desired as well. To put it another way: there was progress, but also retrogression that produced the feeling that change was threatening to become more theoretical than real. The big question at that time, perhaps now as well, is at what point have the relationships between journalism and society been sufficiently recovered? Or to put it another way, when has the role of journalism become one that appropriately corresponds to a democratic, modern, advanced country, comparable to the rest of the EU, to make reference to the most appropriate external context?

Without entering into comparisons, it is questionable whether the last four decades have produced a state of improved reciprocal awareness between the media and society. On one hand, it is possible that a certain collective responsibility can be attributed to the professionals in the field of journalism, since a more optimal model of training and specialisation has not been satisfactorily articulated that is fundamentally oriented towards preventing the production and distribution of content by those without sufficient knowledge of the subject matter. However, it must be acknowledged that progress did occur during the first two or three decades of the new era: specialisation was implemented in editorial offices, with editors as well as professional journalists making notable efforts to articulate procedures for ongoing training, often including active

cooperation with public institutions and private entities or companies, including universities. However, a major backslide has occurred in recent years, no doubt directly associated with the deterioration of the employment conditions and professional environment faced by journalists resulting from the business-oriented response to lost revenues and profits. Training has been somewhat cast aside and a sense of precariousness prevails in the newsrooms, providing a negative stimulus to the willingness of journalists to acquire new knowledge or perfect the knowledge they already have, convinced – and justifiably so – that their company is unlikely to value to it. In some ways, quality has come to count for less than cost when the time comes to consider hiring or retaining editorial staff.

It is not a matter of being naïve either: relationships between the media and those holding power, understood in the broadest sense, have been, still are, and almost certainly should be complex, full of tension, and tending towards conflict. It is worth repeating here the often quoted although probably somewhat cynical definition of news: whatever the most direct subject of the story would not want to see published. Regardless of whether or not that statement is accurate, it is still worth noting that these relationships are based, perhaps excessively so, on a reciprocal lack of knowledge of their respective realities: media professionals are perhaps not sufficiently aware of the realities and structural dynamics of what they are reporting on, but it is no less certain that, in parallel, those working outside of journalism know little or nothing about the processes that lead up to and take place prior to any act of publication. Nevertheless, there is something even worse occurring: lack of

knowledge gives rise all too frequently to the imagination of all types of farfetched ideas, often under assumptions of conspiracy and intentional deception. And this breeds persecution complexes and false presumptions, if not outright plots devised to conceal, falsify, or distort reality. The most generalised accusation that the media has to face is that it acts under varying degrees of tacit interests. What never ceases to amaze is the enormous effort made by the protagonists of a news story to find out, if it has not already been assumed, what is hiding behind a story's publication… or a story's omission. In this way, they give priority not to the question of *what*, but to *why*, to the *origin* of its publication. This means that the actions of the media are to some degree perceived and interpreted as hostile, with less importance, sometimes little or none, given to whether the content published is actually true.

It is possible that few things have caused so much damage to society's perception of the media as what is almost always incorrectly referred to as investigative journalism. It is most apparent that its most noteworthy examples have not derived from the work of any true professional, but rather from leaks or information provided by someone with a clear interest in harming the subjects involved. Resentment, revenge, extortion attempts... all of these have been part of what surrounds the most explosive cases that have taken up the most visible spaces in the media. This also includes, unfortunately, leaking of judicial documents during the investigation phase of a legal case, including some that are subject to special procedural secrecy. Did these come from the same judges or justices who mandated such secrecy? In the absence of tangible evidence, these questions

have gone no further than mere suspicions, but what is nevertheless remarkable is that Spain's Judicial Council has never imposed penalties or even opened investigations when the parties to a court case have learned, through the media, about details of an investigation that have been denied to them in court by virtue of such procedural secrecy. The more-than-evident cooperation by the media with such biased revelations is understandable up to a certain point, but it also leads to a generalised suspicion that any news reporting is susceptible to reflecting a specific intentionality, without even any need to consider whose benefit it has been produced to accommodate.

Such a view of journalism is – it must be said – inappropriate, inaccurate, and therefore unfair in the sense that it is merely a generalisation. Although there may be examples to support it, there is no place for giving such a status to something that is only an exception. What dominates above all in the editorial offices is professionalism, but this is something that, as in any other field, does not always allow for elimination of intentional distortion or error. Nevertheless, one must admit that something is certainly failing, probably from the side of professional journalism, but no less so, or perhaps even more so, from the other side, as the defects and insufficiencies of intercommunication have not been repaired or corrected. Are we simply heirs to the previous era?

When reflecting upon this in a search for what has gone wrong, what comes to the foreground is transparency, a concept that nobody can boast very loudly about even today. It does not seem to be or is not perceived as a concept deeply instilled in society, nor is it certain that it is appreciated on one side or the other as

a *virtue*. Although far from abundant in the media itself, it is even more absent in places where it should appear as a priority for purposes of setting an example. Spain has, infamously, been the European country that has shown the most reluctance, and sluggishness, in enacting a specific law to regulate official transparency, which is a requirement for any advanced democratic society. It came only as recently as 2013, promoted by what has now become the last government to hold an absolute majority in the Congress of Deputies, which was headed by the conservative Mariano Rajoy. The text of that law, timorous and disappointing from the start, has been violated more than it has been observed, to the point where it is decreasingly invoked or insisted upon by society as a whole. What has been labelled the Transparency Portal[4] website is not even properly maintained by those responsible for managing it, and its various reflections in other administrative offices also leave much to be desired. In any event, it is worth emphasising that transparency, even more than being seen as a respected and properly observed legal requirement, represents or should represent an attitude, above all among those acting in the public-political sphere.

There is a profusion of arguments, examples, and responses to show that this requirement does not exactly dominate the dynamics of society. Instead, and as inconsistent as it may be, what predominates is a confusion between opacity and privacy and a sort of overlapping between them. The unquestionable right to privacy – which will be discussed again further later on – does not bring with it any authority to deprive the public as a

4 Accessible at www.transparencia.gob.es

whole of access to matters of societal interest, beginning, clearly enough, with those who have voluntarily been elected and thus obtained the authority to represent, and as the case may be, govern society. However, since the concept of transparency is a priority area of focus, it must not be considered unique or exclusive, but rather extend to cover everything when applied with the ingredients of social responsibility – in other words, when it includes companies, entities, and institutions that play their own roles in, by means of, and for the country as a whole.

Strikingly, this scarce or absent propensity towards transparency has coincided with the rise – perhaps a disproportional one – of a sort of network that is partly a genuine industry, one of intermediation: communication departments and public relations firms, and companies that outsource those tasks, intermingled with the media and the potential issuers of news reporting. There is no area or institution in the public sphere that does not have its own structure for this, whether this means large corporations, associations, or private organizations, regardless of whether they possess their own means or have hired a provider to produce their content. However, the question must be asked: has this improved transparency? At the risk of oversimplifying, the answer seems to be no. It may have even done the opposite. The most likely cause for this, almost surely, is the way the work itself is conceived by those who develop their internal strategies within their own departments, as well as by those who promote their services as external providers.

Again at the risk of engaging in unfair generalisation, and without overlooking the fact that there can be and indeed are exceptions,

there is an overarching belief that this intermediation work is unduly oriented both towards that which is strictly propaganda and that which is intended to prevent the dissemination of anything undesirable or considered inconveniently transparent. This has been the source of developments such as the proliferation of the aforementioned quotation journalism, in contrast to approaches that are more forwardlooking and analytical in terms of events and behaviours, or the overlapping production of news reporting agendas as seen in the various media sources. This is something that, it must be pointed out, has taken place with cooperation, perhaps excessively convenient, from those overseeing the content. One example can be taken from a critical analysis of the pages of the economic newspapers: approximately 80% of what is published every day is common to all of them… presumably *inspired* by the communication departments and firms. This is a sample that can also be replicated in the rest of the media, and it demonstrates that both parties are failing to do something entirely correctly. At the end of the day, setting the agenda, that is, determining the catalogue of newsworthy items at any given time, must be an inexcusable priority for the professional collective operating in each medium.

At this point, it is important to address a phenomenon already alluded to above: the profusion of a follow-the-leader approach in the media. It takes place both in general and, in no small number of cases, in the *acritical* reproduction of outside content, which is especially noticeable in the case of news segments on the radio and, as much or even more so, on television, with the nowrelevant addition of online sources, which often act as both

the source and the distributor of information. This is something that, as can be imagined, acts to the detriment of an authentic plurality of news and information and undoubtedly affects the quality of the contents as well. It facilitates, among other things, the amplification and even solidification of errors, if not flatout falsehoods, in relation to what society believes.

In the end, what is missing is not only a change in attitudes towards reciprocal transparency, but also a dose of no less reciprocal pedagogy that provides a bigger and better mutual awareness of the role played by journalists and their work. There is definitely a lot of road left to travel… and it is a road for which the last four decades have not yet finished laying the groundwork.

II. Managing legacies

Much has been written, perhaps too much, on the protagonism of the media, or of journalists, during the process of transition towards democracy, but it is undeniable that they were protagonists, regardless of whether or not their value is exaggerated. The desire for freedom that existed to varying degrees within Spanish society in those days was clear, and it was demonstrated in the majority of professional fields. In addition, the years following Franco's death were characterised by a sort of complicity between members of the editorial offices and those aspiring to play a political role in what would later come to be known as the Transition. As censored, banned, and punished as dissent was, those who insulted the authoritarian and rather coarse nature of the Franco regime provided points of commonality that, without public expression, allowed for the existence of everything from conspiratorial activities to simple debates and speculations on the potential or desirable options that could become possible after the physical disappearance – already occurring – of General Franco. It is logical that under circumstances characterised by such secret encounters,

politicians and journalists would share an essential protagonism. At the end of the day, the impossibility for either group to openly express themselves generated in them the desire to state their ideas, opinions, and predictions wherever the opportunity presented itself. This gave rise, most of the time, to a sort of collusion that was not necessarily ideal or transparent.

Be that as it may, the reality is that most media sources, almost without exception, were placing their wagers on Spain coming into line with the rest of the European democracies. Even so, there were disagreements in terms of the form, pace, and specific reliance on who should play which leading roles in the phases to come. However, very probably this was not so much a wager by the publishing companies – at least not all of them – but rather the product of a generational shift in those staffing the editorial offices. It is not too surprising that the most veteran had behaved, and in many cases adjusted their behaviour, in accordance with the restrictive guidelines imposed by those in power, often shutting the doors in the faces of journalistic newcomers. However, in view of the new circumstances, they were urged, if not actually forced, to yield some space to those who espoused more open ways of doing their work. There were also, it should be said, opportunistic mutations, replacing the proto-Francoist enthusiasm with another democratic variety that was even greater in its intensity. There were also some exceptions, supporting a sort of cosmetic adaptation of the system that maintained the essentials of what continued to be called a *crusade* or *war of liberation*. This was the case to such an extent that when the critical moment arrived to hold the first democratic elections in the second half of the century, the media

distributed its support among the main existing parties, from the vaguely governmental Central Democratic Union (UCD) to the reborn Spanish Socialist Workers' Party (PSOE) and Spanish Communist Party (PCE), to the lateFrancoist Popular Alliance (AP) and the unrepentant extremists of the New Force (FN) party. What was also remarkable, and which, at the same time, somewhat dispelled the selfassigned role of the media as weighty electoral influencers, was that the relatively intense media support given to the Christian Democrat ticket headed by Ruiz Giménez did not achieve even the minimum number of votes the party needed to gain even one seat in the reestablished Congress of Deputies.

Regardless of its greater or lesser proximity to the various political parties, the media became especially active in the fundamental dispute that dominated the early days of the Transition: what was the best approach to take in relation to the previous regime: reformation or rupture? Although with different subtleties, the predominant inclination was towards avoiding radicalism. In one way or another, the conviction came to prevail that the process was going forward while being affected by a disturbing fragility. At the same time as any hint of a simple cosmetic updating was being rejected, even stronger rejection was directed towards the threat of going backwards, not in terms of what had already been achieved, but in terms of the aspirations to move in the direction of achieving equality with the rest of Europe as a final finishing line. Nothing exemplifies this more than the media reactions when King Juan Carlos forced the replacement of Carlos Arias with Adolfo Suárez as Prime Minister. The interpretation – although it would later be revealed

that he was pressured – that Suárez's history as a minister with Movimiento Nacional, Spain's sole political party under Franco, represented a telling symptom was almost unanimous: for the majority it was discouraging; while the minority was convinced that Francoism would be perpetuated as the political foundation of the new era. In any event, as far as what concerns us here, what is significant is that the media landscape was little-by-little becoming more diverse and pursuing its own options, overcoming the relatively monolithic nature of its previous history. To put it another way, media approval began to gain priority over political approval, and surely that is the basis for attributing it with such a notable, perhaps even determining, protagonism during the Transition.

However, as tends to occur, the laws arrived somewhat late for the long-anticipated opening – freedom – of information. It could be that the physical-biological death of Francoism did not coincide exactly with General Franco's actual death on 20 November 1975, but coincided instead with some later date, such as when the Political Reform Act was passed in January 1977, or perhaps more likely, when the aforementioned replacement of Carlos Arias with Adolfo Suárez as Prime Minister occurred in July 1976. With the arrival of each of those dates, professional journalists were feeling progressively liberated from the limitations imposed upon their work, but it must be remembered that they were doing this without any legal backing: the full content of Act 24/1966 of 18 March, on the Press and Printing, better known as the *Fraga Act*, remained in force, which despite forays into greater openness that had been taking place over time, imposed quite a few limits on any approximation of

freedom. It was very probably the impending first general elections that pushed the Suárez government to pass a law that, although lifting certain restrictions, failed to completely repeal the previous law, but instead maintained and reaffirmed certain rules of the dubious *opening* in a manner scarcely consistent with the democracy he claimed to support.

This electoral orientation can be seen in many elements of Royal Decree-Law 24/1977 of 1 April, on Freedom of Expression. This is a law that, incidentally, had not been reviewed by the legislature, but only more or less corrected by a series of court judgments and rulings, as Spanish judges found various aspects of its provisions to be unconstitutional. Although in general terms the law established the preeminence of ordinary criminal and civil legislation in safeguarding against potential violations of the principles establishing the protection of privacy and the right to personal dignity, freedom from libel and slander, and similar conduct, it established a very unusual system whereby harsher prison terms would be imposed when such offences took place during an election period. It also maintained a wide range of circumstances in which confiscation of a print publication could be ordered, some that already seemed unusual at the time and which are almost shocking today. For the media, punishable acts would include 'news, opinions, and informations' [sic] contrary to the unity of Spain; disparaging or insulting the Institution of the Monarchy or members of the Royal Family; attacks on the reputation and honour of the Armed Forces; and obscene or pornographic publications (repeat offences could lead to inclusion in a registry). Especially controversial and in many cases detrimental were, and to some degree still are, the provisions

from its section 6: ‘the authors mentioned in section 13 of the Criminal Code will be considered to have committed the offences referred to in this Royal DecreeLaw, except when written publications are involved. In those cases, the chief editor of the publication will also be held liable, and if that person’s identity is unknown, or if that person is not in Spain, or is exempt from criminal liability for any of the causes listed in section 8 of the same Code, the editor will be liable and, in the absence of that person for the same causes, the printer.’ That was supplemented by attribution of ‘joint-and-several civil liability’ to the publishing company, except when the offence was materialised in the form of a ‘live radio or television broadcast’. As remarkable as it may seem, such attribution of liability – attribution, delegation, or intentional censorship? – to directors of media sources has not been amended or even limited during any of the last four decades of democracy. Instead, it has continued to be applied and enforced at all jurisdictional levels, including by the Supreme Court and Constitutional Court.

However, no more than a cursory review is required to conclude that the broad provisions for possible confiscation and punishment established under that Royal DecreeLaw have been waning in terms of their application, generating a progressive advancement of freedoms, albeit *de facto* progress rather than *de jure*, in some ways representing an anomaly for the legislative framework. And aside from the abovementioned developments derived from the subsequent caselaw produced by the courts, it is also true that only on two occasions did the government, first, and parliament, later, enact laws or legislation related to news reporting in a more or less progressive direction: Organic Law

2/1984 of 26 March, on the Right to Rectification, and Law 29/1984 of 2 August, on Subsidies for Journalism Companies and News Agencies. Nothing more but nothing less either, leaving the media to conduct their work in a sort of legal limbo (with radio and television, as mentioned, being subject to specific supplementary regulations), shaken up a bit in recent times by the emergence of online media sources and social networks, which seemed at least at first to be relative orphans to regulation. Undoubtedly as a result of all this, the debate remains open, and repeatedly emerges, regarding how pervasive the *excesses* of the media have become or, more fundamentally, those of professional journalists and news producers. I will refrain from adding here, to put it one way, more explicit and exclusive reference to the criminal and civil laws, and to specific laws that fundamentally give rise to legal insecurity and uncertainty for those practising the profession. Progress has undoubtedly been made in terms of the existing jurisprudence, but perhaps not enough, because the laws have still not been set forth by means of texts with sufficient, and sufficiently convincing, clarity that prevents the need for interpretive discretion.

Shifting the focus now from the legislative aspects to the actuality of the industry, the newly emerged democracy found itself inheriting a significant media apparatus cloaked in reminiscences of the idiosyncratic propaganda that formed its foundation. In addition to *Radiotelevisión Española*, with its two television networks holding the monopoly in that medium, and a powerful radio network with nationwide and foreign coverage managed by *Radio Nacional de España*, Spain's central government also controlled *Radiocadena* (the former *Red de*

Emisoras del Movimiento or REM) and *Cadena Azul de Radiodifusión* (CAR), along with various other radio stations dispersed throughout the country. Also, by legal imperative it held a substantial shareholding stake in the *authorised* private networks, beginning with the one known as SER. It also had an active presence in the area of the printed press, by means of almost 50 titles published by Prensa del Movimiento, in addition to the evening newspaper *Pueblo*, associated with the industrial unions, which also had some radio stations and a supposedly specialised news service. However, perhaps the most decisive aspect was control over the news distributed via the central government's EFE news agency, which was supplemented by its competitor (?) Pyresa, also affiliated with Prensa del Movimiento.
It must be said that the transformation of society had allowed for the insertion of new generations of professionals into the government's media apparatus, who far from sharing the views of the founders, were eagerly awaiting a time when they could do their work free from conditioning risks, restrictions, and straitjacketing. The scene was clearly far from uniform and, in any event, the directorial positions were primarily occupied by those with allegiance to the system, whether by convenience or conviction, who had in one way or another participated in the tactical retreat that a portion of Franco's loyalists undertook as his physical demise became apparent. The conversion, therefore, took place in a piecemeal manner, above all beginning with the designation of Adolfo Suárez as Prime Minister, which was the true starting point of what has now become known to history as the Transition.

Be that as it may, it cannot be said that prior to 1976 there were

not spaces of relative freedom that had opened up in the public media. One iconic case in point involves the events that took place at *Radio Television Española*, or more specifically, with some of the news segments broadcast by *Radio Nacional*, where without losing total control of everything, the authorities from the then Ministry of Information and Tourism had been relaxing their demands for purely ideological and propaganda-oriented content, an approach that the Ministry did not entirely follow in the case of *Television Española*. As an anecdotal example, the first source to report the resignation of Carlos Arias as Prime Minister on 1 July 1976 was one of the public broadcasting networks, *Radio Exterior*, and the Director General of RTVE at the time, who was on an official visit to Helsinki, found out through someone at the embassy and thought that the news must have come from a foreign news report… until he was able to confirm that it had been broadcast from the studios at Prado del Rey in Madrid. Needless to say, the rest of the central government's media outlets did not publicise that news until well into the afternoon, once it had been *officially* released.

As strange as it may seem today, the newspapers published by the government's Prensa del Movimiento were not privatised until well into the 1980s, with a socialist government already in power. A few, maybe a halfdozen of the almost 50 in that network, disappeared after the first democratic elections, including *Arriba*, a newspaper with nationwide circulation. The vast majority, however, were transferred into the hands of private publishers by means of an auctioning process held between 1983 and 1984, which was characterised more by obscurity than transparency. These auctioned-off publications would meet with

an irregular future. It is important to recall that most of these publications, many of which were seized during or immediately after Civil War, effectively held a monopoly in their areas of distribution, which was usually the province in which they were produced, with the only competitor being the nationwide media, or in some cases other regional sources. As an interesting side note, it is worth mentioning that the professionals comprising the staffs of the liquidated media sources, and also those who did not fit into the plans of new owners, automatically began to enter into the press offices of the ministries and other public bodies, being granted the status of officials with guaranteed rights, including seniority. Not long after, in May 1984, one of the public newspapers that had achieved the highest circulation figures was shut down: the evening newspaper *Pueblo*. To a large degree, its disappearance was caused by the crisis that affected all of the afternoon newspapers, an impact that could also be seen in newspapers that were remnants of an earlier time, such as *Informaciones* in Spain and the legendary *Le Monde* in France, which had to gradually reemerge via a presence on the newsstands along with the rest of the morning papers.

The journalistic landscape began to change gradually. It did this, of course, through progressive standardisation with the habits and practices of the other European markets, regardless of the inequities one could cite among them. The general panorama was characterised by circulation figures far below the averages seen in the most directly neighbouring countries, to the point where some even yearned for the historical figures from the years prior to the Civil War, both in terms of number of titles and readership percentages. It is true, however, that the main differences

between those two periods mostly lay in reference to the major capital cities – Barcelona and Madrid – rather than to the country as a whole. Nevertheless, the most widespread belief in those times brought with it a multiplication of titles, with the resulting expansion of the offerings available, which – it was thought – would contribute to an increase in readership, at least in the medium term. However, as time passed it became clear that this would not be the case. New media sources emerged, although not too many, and those that managed to become established did so at the expense of the most veteran publications, which lost readers to the point at which several were forced to close up shop, as will be discussed further below. Nor did the expected increase in readership occur: the overall numbers would remain quite stable almost until the beginning of the 21st century, with a sharp decline beginning at that point, especially after the economic crisis-recession of 2007-2008, which would compromise the viability of the print media.

Without getting into a discussion of specific cases for now, it is worth pointing out that news reporting, or journalism if that term is preferred, continued to be largely concentrated in terms of the impact of information on society on the radio and, above all, on television. The recovery of freedoms and reestablishment of democracy caused very little, in fact hardly any, variation in the channels primarily used by the public to learn about current events. As such, viewership of daily television news programmes, although they were still monopolised by public sources up until 19891990, continued to be several times larger than the readership figures for newspapers and magazines, gradually approaching the number of radio listeners. This was especially

true after 1977 with elimination of the exclusivity that had been given up until then to *Radio Nacional de España* (RNE), whose *news briefs* every broadcaster in the country had been required to broadcast by means of a live connection.

In the sphere of the print media, for years the general news magazines maintained the special protagonism they had achieved during the last years of Franco's regime. Since they had still not been fully released from the pressures of censorship, they were subject to occasional confiscations and more than a few court cases for anything the authorities considered to be transgressions against orthodoxy. The reality is that weeklies such as *Triunfo, Cambio 16, Doblón,* and *Destino*, among others, had demonstrated special skills and bravery in pushing, and even crossing, the boundaries that had been established by the Press and Printing Act, which was still in force at the time after being enacted with the encouragement of Manuel Fraga in 1966. The result is that those publications, and of course the professionals who worked for them, tended to cover news stories that the daily newspapers could not or did not want to pursue. More than a few chief editors, editors, and writers working for those media sources had to face legal hassles and even punishments for going beyond what was permitted in terms of reporting the truth. This is something that, it is fair to say, did not entirely disappear with the death of General Franco, although the boundaries of freedom were continually expanding up until the time when they were fully consecrated in Article 20 of the Constitution in 1978. One peculiarity of that era that could perhaps be referred to as the *preconstitutional shift* was the proliferation of publications generally referred to as *confidential*, theoretically with a very

limited circulation, which dared to disclose facts and opinions that the press, whether referring to the dailies or the magazines, preferred not to publish. And some of those sources certainly acquired extraordinary influence, as in the case of *Off the Record*, *Euroletter*, and *Boletín Económico*, published by the Europa Press news agency.

One relevant transformation that took place on the news reporting scene was the emergence of economic news as a distinct specialisation. Until the mid1970s, hardly any news of that nature, beyond stock price quotes and market analyses, was published in newspapers or magazines, and even less so if pertaining to actual companies, and with a degree of independence that left much to be desired. In general, the only thing that appeared in the media was what were referred to, whether rightly or wrongly, as *remitidos* (dispatches), which were press releases produced by the companies themselves or by official bodies, either directly or through what was then an incipient industry of firms focused on public relations, advertising, or communications. The newspapers, more than the magazines, generated a significant portion of their revenues through announcements published by corporations about their general shareholders' meetings, which were charged rates substantially higher than those established for other types of advertising. At the same time, some professionals earned extra income in the form of *per diems*, stipends they received for attending such corporate meetings, and in no small number of cases, they carried out their work as journalists while simultaneously being affiliated with corporate or official press offices. In general, however, periodicals did not include specific

sections dedicated to economic news… until the mid-1970s, as mentioned above.

One of the earliest advances in terms of specialised news reporting covering economics and business was a section that appeared on a weekly basis in the evening paper *Informaciones*, published in Madrid, with the distinctive feature that it was printed on yellow pages. More or less in parallel, two weekly magazines also ventured in the same direction: *Cambio 16* and *Doblón*. Another newspaper that began to dedicate a few pages to a section on the economy and employment was the unionaffiliated evening paper *Pueblo*, with the rest gradually beginning to follow suit. However, the definitive leap towards putting economic news reporting on equal footing with the rest of a newspaper's sections took place with the appearance of *El País*, which from the beginning made a decision to group news of that nature together with the job vacancy notices under the unique heading of 'Economy and Employment'.

For the industry, what could be considered as most innovative was to a large degree the result of professional initiative, or perhaps corporate initiative, promoted by a small group of specialised journalists who had begun to concern themselves with these emerging news sections focusing on the economy. The Association of Economic News Journalists (*Asociación de Periodistas de Información Económica* or APIE) was initially organised in Madrid, and under its influence some guidelines on transparency, independence, and professional practices were established. Among the most relevant were those insisting on the absolute incompatibility of being employed by a newspaper while

maintaining any type of link to companies or public bodies, or to put it another way, they insisted on the exclusivity of journalism work, to the point where only those willing to agree to this would be accepted into the Association. Its members were expressly prohibited from accepting the *per diems* mentioned above or from collecting payments for publishing more or less intermediated information related to shareholders' meetings. A kind of funny side note is that this gave rise to the designation of two distinct groups of news reporters at such corporate meetings: those colloquially known as *sobrecogedores* (fee collectors) and everyone else. It must be pointed out that the standardisation encouraged by the APIE did not have immediate effects, but very gradually that standardisation did become more generalised, among other reasons because the media sources began to assign their economic news reporting only to professionals who had agreed to comply with the Association's code of conduct. Another significant accomplishment of the APIE was, and even now continues to be, providing training courses and programmes for its members with the aim of improving the quality and reliability of that specialised information. In addition, the initiative begun for media sources based in Madrid was expanded to cover the rest of Spain, and what began as specifically focused on the print media ended up being taken up in radio and television as well. It was just a first step, but one that was followed by other specialised groups or those focused on other types of news media, which were being formed, at least in theory, to promote adherence to codes of ethics and to improve the quality of news reporting in their respective fields.

In general, specialisation came to be a basic characteristic of the

way the various media sources evolved. There was an almost across-the-board shift from the traditional figure of the *allpurpose* journalist to a concentration on professional careers focused on each area, section, or speciality. Even within any one of those areas, dedication was gradually becoming limited, for example, to a specific party for political news, or a specific industry to be covered for economic news. This undoubtedly resulted in better quality news pieces being produced, which in turn reestablished significant levels of reliability, credibility, and influence, above all for newspapers, although unfortunately this did not end up boosting circulation figures, or at least not as much as expected. And it is important to acknowledge that, on the negative side, this could have facilitated cases of *capture* of journalists by those theoretically affected by their work, or even a sort of *Stockholm syndrome* by which a journalist would end up being essentially incorporated into the subject on which their reporting was meant to focus.

The next step was undoubtedly the successive appearance of daily newspapers dedicated strictly to economic news, completing a disaggregation that had already taken place sometime earlier for sports reporting and certain other subjects, for example, cultural topics, although in that case usually on a weekly or monthly basis. The first economic newspaper, *Cinco Días*, was established based on the initiative of a group of professionals who had previously been linked to the economic supplement from *Informaciones* mentioned above. That new title, published only Monday through Friday, first appeared on the market in March 1978. Years later, in May 1986, it would be followed by the daily newspaper *Expansión*, which was developed

by the Grupo Recoletos publishing group that was traditionally linked to Opus Dei, and which was already publishing the specialised magazine *Actualidad Económica* as well as *Telva*, oriented towards female readers. It had also taken on ownership of the sports newspaper *Marca* when the periodicals of Cadena del Movimiento were being auctioned off. As a way to distinguish the new paper, a decision was made to launch a weekend edition of *Expansión*, which was sold on Saturdays. The relative success of both *Cinco Días* and *Expansión* led to the appearance of two more in 1989, which made Madrid the only city in Europe publishing four economic newspapers. Very soon thereafter, *La Gaceta de Negocios* appeared, published by Grupo Zeta, as well as *Economía 16*, published by Grupo 16. A few years later another arrived on the scene, *El Economista*, under the auspices of Alfonso de Salas, who was one of the dissenting founders of Unidad Editorial (*El Mundo*) associated with the publishing group of the Italian patron. Those publications would have an uneven future, with those currently surviving in the market including only *Cinco Días*, now owned by Grupo Prisa (*El País*), *Expansión*, published by Unidad Editorial (*El Mundo*), and *El Economista*, still apparently under its initial ownership. Along the way *Economía 16* disappeared after failing to survive for even one year on the newsstands, and the *Gaceta* has only survived in an online version, after reverting to the format of a general newspaper under the ownership of Grupo Intereconomía.

Before going on to describe the ups and downs that have characterised the experiences of the rest of the news media, whether in the form of magazines, newspapers, radio, or television, it is important to emphasise the paradox, or perhaps

better put, the sublime contradiction, in which the country's journalism sector found itself. While the respective editorial offices tend to echo, with unbreakable unanimity, the demand for transparency for each and every one of society's institutions… at the same time they are far, far away from actually practicing it, with the sole exception, and not exactly an outstanding one, of those subject to obligations derived from being traded on the stock exchange. A good part of what can be told about the history of the media comes from versions that are expressed in a more or less extraofficial manner. Figures on sales, revenues, circulation, costs, etc. are often hard to come by, if not an outright secret thanks to the actual ins and outs of the ownership and financial dependencies of the media outlets. This has been a dominant and permanent characteristic during the last four decades, and one which over time, even up until the present day, has increased rather than decreased.[5] It is possible to interpret this sort of opacity as flagrantly unfair for the readers, listeners, and viewers, and such an interpretation would probably be well justified. But above all, it contradicts the character of a vehicle that performs the role of a twoway intermediator for society. An important element to take into account is the suspicious, but certainly real, presence of corporations, institutions, and even public bodies among the shareholders, financers, or supporters of more than one media source. However, since this presence remains hidden from the eyes of the public, the public is in turn deprived of knowledge regarding the degree to which the information they are being given may be partial, biased, or selfinterested. Unfortunately, presences of this type have

5 2018 Report. Commitment and Transparency Foundation (*Fundación Compromiso y Transparencia*).

become more extensive in recent years, coinciding with or derived from the crisis into which the industry was subsumed, above all in the area of printed periodicals, but no less so in the emerging digital and online sources, whose economic viability or business model has not yet been fully established. The most obvious result of this has been the reduction, in some cases to a scandalous degree, of the freedom and independence of professionals, and therefore the product they produce, which along with other factors such as the increasing precariousness of employment conditions, has significantly eroded the levels of quality that had been achieved years earlier.

II.1. Mondays too

If there is one thing that has changed radically during the last 40 years it has been the production processes used by media sources, and as a result of this, their organisational processes have changed too, especially those of the print media. The printing shops dominated by linotype machines, where newspapers were laid out and printed are now *terra incognita* for journalists, except for the most veteran among them, as much or even more so than the sounds of the teletypes churning out the latest news or the incessant clattering of typewriter keys that used to be the backing track for every newsroom. Today silence rules, along with computer screens and even carpeted floors to keep noise levels down. Professional practices have changed just as much, especially in relation to the workday. Fairly progressively, the traditional morning *deadline*, which for most

publications fell in the hours before dawn, has now shifted so that a journalist's workday is almost the same as that of any other professional. The frenzy in the editorial offices no longer goes on past 8 or 9 pm, which for better or for worse has made working late at night – or even all through the night – a subject for nostalgia, along with the bohemianism long associated with the profession. However, although perhaps less wellstudied, there was one event with a sudden, unexpected impact that notably changed the working dynamics for journalists: publication on Mondays. For decades, Monday publishing was something akin to taboo, supressed to the theoretical and somewhat doubtful benefit of the groups associated with Prensa del Movimiento, who had been granted the privilege of simply publishing a *Hoja del Lunes* (Monday Sheet) in each of Spain's provinces. What is remarkable is that there was no legal imperative for the effective break that occurred with that tradition, nor any agreement among those in the industry. Instead, a single newspaper, *Diaro 16*, was simply responsible for that shift, which materialised in 1980 at the initiative of its creative editor Juan Tomás de Salas, and it did not take long for the publication's most direct competitors to follow his lead. With this being the case, the last *Hoja del Lunes* was published on 13 May 1991 in the city of Gijón, although most had already disappeared a few years earlier. Though the change may have seemed harmless enough, it altered the dynamics of professional journalism quite substantially.

Publishing on Mondays forced writers and editors to work at full speed on Sundays, notably modifying their working week, among other reasons because collective bargaining agreements had previously guaranteed Sunday as a day of rest. To counteract this,

publishers had to hand out bonuses for working on the weekend, without any real calculations available to know whether those extra costs would be balanced out by the additional revenue generated by a presence on the newsstands seven days a week, instead of only six as before. Be that as it may, what is certain is that newspapers soon began to radically differentiate their Monday through Friday editions from those appearing on Saturday and Sunday, in many cases with specific editorial teams working on one or the other.

Although it is unclear how much the newly introduced Monday editions had to do with it, newspaper publishers raced to reinforce their Sunday editions, expanding and multiplying the materials offered using content such as supplements, new sections, and other materials. To a large degree they followed the model of the large American dailies, which published weekend editions that were distributed on both Saturday and Sunday with hardly any changes or updates, and which had acquired over time a volume that the Spanish press would never be able to match. Not long after, this, in their drive to gain readership, Spain's newspapers would enter into the territory of what are rightly or wrongly known as *promotions*, that is, including all types of gifts, games, contests, and loyalty-inducing items with the purchase of the newspaper, sometimes without changing the sale price for a copy, or else imposing only a nominal increase. This took place to such a degree that some people, with more than a hint of sarcasm, began to believe that publishers had decided to become *retailer-distributors* for all types of objects, with a newspaper thrown in as a *free gift* to complement the purchase. This gave rise to the emergence of a

new collateral industry, focused on designing and, to a greater or lesser degree, managing these promotions, which prospered as the practice became more generalised in the industry.

The experience gained from these promotions, which had become especially significant and highly concentrated in magazines, including both specialised titles and the general news weeklies, was never objectively evaluated. The fact is that some of them, but by no means all, achieved their goal of increasing circulation figures, but the effect was ephemeral to the point that once the campaign ended, sales figures returned almost magically to their previous levels. The most commonly cited example of these effects involves *El Sol*, a newspaper with nationwide distribution that appeared at the beginning of the 1990s, produced by the Anaya publishing group and some of its partners. Undoubtedly because of its experience as a book publisher, and in an effort to improve circulation, a decision was taken to give away a collection of books from its publishing catalogue in order to achieve a spectacular rise in sales figures… although nevertheless, once the promotion ended, reader demand fell sharply, almost mathematically reestablishing itself at the level of direct sales prior to the campaign. In this case as well as in the rest, no serious cost-benefit analysis was ever revealed by the publishing company. However, one might conjecture that the conclusions would not be entirely positive, considering that in the end the practice almost entirely disappeared. These types of promotions are run today only as an exception, and in many of those cases only as a device to provide incentives for subscriptions, although that form of establishing loyalty has never held any special prestige among consumers. The figures for

newspaper subscriptions have never been high, with the exception of *La Vanguardia* in Barcelona, and many publications have even given up seeking that type of affiliation.

However, the statement above refers to individual subscriptions, or in other words, those freely chosen and contracted by individual readers. This is the type referred to in the comment made above regarding *La Vanguardia*, which is historically the only paper that has maintained a notable *stock* of affiliated news addicts, to the point where in some cases a subscription passes from parents to children or is even included among the assets in an inherited estate. In contrast, the type known as *block* sales or subscriptions are a different matter entirely, which on many occasions conceal commercial agreements, subsidies, or other forms of granting *favours* between entities in the media. At certain times, and with uneven intensity, *purchases* of a certain number of copies by a government entity have proliferated, under the assumption that they will be distributed in offices, schools, senior centres, etc., but behind the scenes, these deals are made with the political intention of establishing – or conditioning? – closer relationships with the media. Also, with the establishment of Spain's regional autonomous communities, commitments to support publications or periodicals in one of the country's other official languages have frequently been formed using that mechanism, often with the assumption, or even with evidence, that those publications would be unsustainable if supported only by the whims of consumer preference. It would seem that the institution most active along these lines, even today, has been the regional Government of Catalonia, which is believed to support no less than 650 publications within the

territory of that autonomous community.[6] Another commercial modality that has appeared more recently has been the agreement to distribute a particular magazine, published by an unconnected company, along with one of the daily editions of a newspaper, which is done with the hope of reciprocal increases in their circulation figures.

It is also worth mentioning here the correlation, not always explicit, between circulation figures and the volume of advertising that a publication manages to include. For the print media, the certifications issued by the Circulation Audit Office (*Oficina de Justificación de la Difusión* or OJD) and the General Media Studio (*Estudio General de Medios* or EGM) are considered fairly reliable quantification sources by the advertising agencies and media clearinghouses that distribute, allocate, and contract inserts for ad campaigns. For the audiovisual media, the EGM is the predominant source for both radio and television, with the audience metrics produced by Kantar Media also very important for the latter. The efforts that both the OJD and EGM have developed to measure the penetration of new online digital media sources can also now be added to these. All of this is taking place with the goal of providing advertisers and their intermediaries with tools for measuring the cost per impact of their advertisements and related investments.

In reality, it is clear that no quantitative measurement is sufficiently satisfactory to form the basis for decisions about advertising investments. Because of this, both agencies and

6 For years, the region's two main newspapers, *La Vanguardia* and *El Periódico*, have issued simultaneous editions in Catalan and Spanish.

advertisers have been introducing tools designed to complement that information, by producing qualitative profiles of the *consumers* of each medium or advertising modality used in their campaigns. Furthermore, *ex post* studies of impact and effectiveness have been added to *ex ante* evaluation. One of the most widely used consists of measuring the degree to which people remember certain advertisements, in order to determine how much a reader, listener, or viewer has actually received the *impact* produced by the advertisement. In addition to revealing some surprises, for example, confusion of brands[7] or misinterpretation of the intended message, this has also raised a debate, which for the time being remains unresolved, regarding the effectiveness of television advertisements, which are generally inserted in blocks that far exceed the time limits imposed by law. The networks have reacted to this by providing single advertising spots with *ad hoc* rates. However, the most serious uncertainties continue to revolve around advertising inserted in online media sources, where the industry does not seem to have successfully established a reliable way of ensuring the effectiveness of the advertising purchased. This is very likely the reason why, despite increasing investment in such sources, the proportion of total investment represented by online advertising remains fairly stagnant, with fees also being set at levels far below those charged for other media. It is also important to remember that web surfers have various means at their disposal to prevent banners, pop-ups, and advertising messages in general from appearing in their browsers. This is

7 There are cases such as the one in which a newcomer to the sector created advertising that was attributed to its leading competitor, or when a brand of tinned foods used graphics that made shoppers think it was pet food.

undoubtedly the source of the economic and financial weakness that characterises online activities, with the notable exception of the big players, especially Google with its clearly dominant position in the search engine market, although its approach to advertising differs substantially from those applied by websites providing content and information.

It is no revelation that advertising revenues are an essential component of any media source's bottom line. This is because, as in the case of most print media, their selling price is far from adequate to cover the total costs incurred for their production and distribution. This is even more so for the audiovisual media, with the exception of television channels that have adopted subscription or payperview models. This is also why the market is dominated by a neverending battle among all participants to attract the highest possible number of advertisers, by combining at least two factors: audience numbers and advertising rates. Creation of a balanced mix of those two elements brings into play the *technical* tool most commonly used by the industry and by the advertisers themselves: the socalled GRP, which stands for gross rating points, also referred to by advertising professionals as *cost per impact*. Without going into too much detail, this metric is related to the number of times an advertisement is viewed, or the number of people who view it, in each selected medium where there is a fixed cost for inserting the advertising. Other relatively sophisticated approaches, as mentioned above, have been added to this in pursuit of better ways to measure effectiveness, such as by determining how well an advertisement is remembered, the perception created in the reader/listener/viewer, or the demographic categories of the

audience (age, occupation, education, urban or rural, etc.), all in pursuit of optimising investment.

There is another aspect of advertising that deserves separate mention, and which has little or nothing to do with the commercial aspects. Inserting advertisements and obtaining sponsorship has always been a widely adopted way of contributing to the financial sustainment of a media source, although such practices are rarely fully transparent. The possible motivations behind these efforts are in fact so broad that they can only be imagined, and the same is true as far as the real or supposed benefits that the media source displaying an advertisement provides to its benefactor. It is also logical to assume that since the economic crisis, things have gone from bad to worse. This complexity is now commonplace across the entire range of media outlets, but it seems especially widespread in the proliferation of websites not linked to any communication groups. For all of the same reasons mentioned above in relation to advertising in general, there are hardly any media sources existing exclusively on the Internet that are achieving even minimum levels of profitability. Their survival is therefore conditioned upon recourse to an ongoing series of capital increases, the more or less transparent *sponsorship* of one or more companies, or very frequently both at the same time.[8]

Without jumping to conclusions about how all of the above could work to the detriment of the media's independence and impartiality, it would be not be extraneous for consumers to be

8 Discussed more extensively in Section III.4, *Surviving online.*

aware of the agreements, subsidies, and sponsorships that have been established. In the absence of this, in addition to spurring rumours and suspicions, often unfounded, consumers are deprived of their right to know whether a certain piece of news or opinion has been *subtly* influenced or conditioned by the factors described above. This is just another part – as already explained – of the paradoxical situation in which media operators frequently seem to find themselves: demanding transparency from everyone, while at the same time going about their business in an environment of complete opacity. And there is no need to deny the fact that this, among many other reasons, could be the basis for a great deal of the increasing loss of trust that can be perceived in much of society.

The changes that have been introduced into the media landscape have greatly diversified audiences, and therefore the distribution of advertising campaigns as well, but to no lesser degree they have initiated sociological transformations, which include the changing profile of the main advertisers. For example, automobile manufacturers have acquired an undisputed primacy, to the point at which there was a time when some believed – only half-jokingly – that the media was a sort of auxiliary industry to that of the automakers. But joking aside, the reality is that much of the investment in advertising is increasingly concentrated in just a few products/brands (cars, retailers, phone companies, services, etc.), while at the same time a preponderance of advertising is focused on television. The incursion into online media, despite its palpable pervasiveness in our society, has not entirely finished taking off yet, capturing only around 10% of the total advertising investment, which in addition to failing to meet

expectations, actually seriously compromises the viability of many Internetbased media sources. It can also be said, however, that the relationship between diffusion/audience and the amount of revenue generated via advertising does not always correspond to the theoretically prevailing quantitative estimate. Certain media sources are traditionally stronger in terms of bringing in advertising revenue because of the profile of their target audience, while others, for reasons never made explicit, seem to be especially subject to the preferences of advertisers. The most exemplary case here is probably that of the sports press, which has circulation figures equal to, and actually surpassing in many cases, those of the bestselling newspapers. Sports publications, however, include scarcely any advertising, and in general they fall outside even the most extensive advertising campaigns appearing in the rest of the media.

It was not until the mid-1960s that the advertising industry, and therefore advertisers themselves, had relatively independent measurement tools that would allow them to actually know the distribution or influence of each medium in terms of public viewership. The first of these was the aforementioned Circulation Audit Office (OJD), which was launched in 1964. Four years later, an initiative was introduced that led to creation of the General Media Studio (EGM). Although using different methodologies and producing metrics that were fundamentally disparate, specific instruments were becoming established as the most reliable and credible in terms of the datasets generated in relation to the market positions of the various media sources. Another tool must also be added to these, one specifically for television and largely complementary to the EGM, which was

dedicated to measuring the audience for each network/programme during each time segment, using viewing meters installed in a sampling-based distribution of homes.

The OJD was established in 1964 with the participation of advertising agencies, advertisers, and media outlets. What sets it apart is that it audits the numbers generated and the sales figures provided by the media sources affiliated with the system. Although affiliation is voluntary, it is rare for any media source to reject it, as that decision would clearly have a negative impact on its ability to bring in advertising. In order to determine the final figures produced, a variety of weighting criteria are applied to transactions at newsstands, commercial agreements for sales in blocks, subscriptions, and even promotional distribution potentially taking place at no cost and focused on particular groups. Inspections are conducted, both scheduled and surprise, and partial certifications are issued during the year as well as a final certificate for each annual period. The activities of the OJD and its procedures have never been free from controversy, however, even to the point where some media outlets have been excluded, either by the organisation itself or at the voluntarily initiative of publishing firms unhappy with the final verdict. These tensions have been growing in recent years, above all beginning with the financial crisis of 20072008, which saw sharp drops in cumulative distribution in the order of 17% annually. Over the course of recent decades, both the methodology used by the OJD and the scope of its activities have been evolving, in particular since the beginning of the 21st century, with the inclusion in their certifications of the number of *views* of media

sources distributed online.[9] Their reliability, nevertheless, leaves much to be desired – for now – not only because of their evaluative methodology, but also because of the profusion of *tricks* that the media outlets themselves attempt to use to overestimate their actual audiences, and it will be worthwhile to keep this in mind when considering the circumstances for media sources existing online. Nevertheless, the credibility given to the OJD's certifications was very likely the reason why they were established by Spain's central government[10] as a benchmark for the granting of subsidies to the press. In 2004, the name of the OJD was changed to the Information and Publication Monitoring Company (*Sociedad de Información y Control de Publicaciones*).

Although its activities also cover the print media, when the General Media Studio (EGM) was first developed in 1968 on the initiative of advertising agencies, advertisers, and media sources, its efforts were more focused on radio and television. Its unique contribution is that it measures what can be considered the consumer *recall rate* for the media outlet in question. Its methodology is based on 30,000 interviews conducted each year in three waves, with 27,000 being inperson interviews and the other 3,000 taking place by telephone, using a questionnaire oriented towards determining which media sources have been *consumed* during the previous hours/days. Those three waves are designed to collect data during the months of April, June, and November, and they tend to be determining factors for the

9 Metrics are currently taken on approximately 250 websites.

10 Spanish Act 29/1984 of 2 August, which Regulates Granting of Subsidies to Journalism Companies and News Agencies (*Ley 29/1984, de 2 de agosto, por la que se Regula la Concesión de Ayudas a Empresas Periodísticas y Agencias Informativas*).

respective spring, summer, and Christmas advertising campaigns, which is when the majority of advertising investments tend to be concentrated. Over time its range of services has been expanding, adding supplementary field studies commissioned by specific media outlets and analyses in the emerging field of online media.

Along with the data provided periodically by EGM, the strategies of the television networks tend to be determined by a technology that allows audiences to be measured almost in real time. This data is provided via the use of audience meters, installed based on an anonymous sample of homes distributed throughout the country. The gradual development of this measurement system has taken place, as might be imagined, in parallel with the evolution of the industry. This method was not used during the early days of television in Spain, when *Televisión Española* (TVE) still enjoyed an absolute monopoly, which is why its appearance in that market occurred later here than in other countries. The first steps towards using these meters were taken at the beginning of the 1980s, when TVE still had broadcasting exclusivity. The introduction of this technology probably occurred as a result of pressure from agencies and advertisers, who, though they had no alternative outlet for their audiovisual campaigns, still demanded a reliable tool that would allow them to evaluate the fees imposed by the monopoly and calculate the gross rating points mentioned earlier. The public broadcaster therefore put a company called Ecotel in charge of measuring its audiences, which was a subsidiary of Telefónica, the government-owned telephone company that also held a monopoly in the Spanish telecommunications market. As time went on, its

measurements were acquiring a relative degree of credibility. The appearance of the private networks, however, inspired the emergence of a new *viewership measurement system* in 1989, this time with the company in charge being Mediacontrol, which was linked to Sofres, a leading French marketing and opinion barometer. This produced the immediate result of measurement discrepancies between the two systems system. Sometimes the metrics produced were even contradictory, which gave rise to a situation in which both the networks themselves and the advertising industry considered their coexistence to be impossible. This duality ended up resulting in a merger of the two companies in 1993, which years later in 2010 would come to take on its current name of Kantar Media, thereby becoming the main source of data for the industry. At the same time, the metrics were becoming more sophisticated, from the initial evaluation of a 15minute time slot to almost realtime measurement. Also, like the other viewership measurement providers mentioned above, Kantar has extended its activities into the online world, especially after Nielsen Online decided to withdraw from the Spanish market in 2013.

As a last note on this subject it is worth mentioning that in recent years the media outlets themselves have undertaken their own studies for measuring distribution, audiences, and customer profiles. This is the case, for example, with Tele 5, a nationwide television network owned by the Mediaset group, which distributes its own audience data either prior to or in parallel with the figures provided by Kantar. Television viewership has definitely gone from being a subject where knowledge was limited to the professional sphere to being something distributed,

even if only *roughly*, to the general public. It is quite possible that providing detailed breakdowns of those audiences is part of the effort made by the networks to configure some consensus of opinion favourable to their interests. In other words, there may be a presumption that knowing that a network is beating its competitors in a certain time slot, or in its overall ratings, tends to provide some sort of incentivised attraction or loyalty, producing a sort of feedback loop for its *share*. It is important to note, however, that the actual figures do not tend to confirm this perception, since the distribution of viewership percentages varies quite notably, and it is based upon many factors, ranging from general acceptance of the programme being shown to the shows being offered by competitors during the same time slot. This battle has now taken on a programme-by-programme dimension, rather than one between entire networks, leading them to resort to counter-programming strategies in many cases. However, although this approach may have value for more generalised broadcasts being offered to the public for free, it could lose its validity if, as seems to be happening, other modalities of providing televised entertainment continue gaining ground with more individualised, *à la carte* options finding greater popular acceptance.

Beginning with our presentday circumstances, all signs seem to indicate that fragmentation will not only continue for a long while but will intensify as a result of, among other reasons, wellestablished specialisation, particularly in relation to television. And this is true not only in terms of time slots, but also networks dedicated preferentially, if not exclusively, to audience segments with specific interests. This is already taking

place in the modalities of subscription, streaming, and similar approaches, but these trends can now also be seen in broadcasting open to the public, with the various brands held by the two major media groups. This is something, as explained above, that two public networks, *RTVE* and Catalonia's *TV3*, began experimenting with some time ago. Both have been emulating each other, dedicating individual channels to news (*24 Horas* and *3/24*, respectively), documentaries (*La 2* and *TV33*), sport (*Teledeporte* and *Sports 3*), and children's programming (*Clan* and *Super3*).

II.2. The useless battle over the card

It may have been one of the most pointless controversies in journalism during the final two decades of the last century. For years, the question of whether or not an academic degree and press card should be required in order to work as a journalist divided the profession, sometimes rather artificially. Curiously, the publishers remained fairly uninvolved, hiring writers, editors, middle managers, and even chief editors without requiring them to have ever set foot in a journalism school or media studies department, or to possess any sort of press pass or membership card.[11] In the end, the controversy ended up being resolved *de facto* by the professional associations, which began to accept as members anyone who worked at any sort of media outlet on news reporting tasks, regardless of their academic qualifications.

11 For more than a decade, the chief editor of the Barcelona newspaper *La Vanguardia* had a degree in law but no journalism credentials.

In the final stages of Francoism, journalistic training and the resulting credentials migrated to the universities. The old journalism schools faded away, while newly formed media studies departments were progressively emerging. The practice of the discipline went from one vaguely requiring a lowlevel university degree to having the status of a subject worthy of a full bachelor's degree, and even doctoral degrees in certain universities offering them. Up until that time, access to the profession, via the compulsory acquisition of an official press card, was restricted to the official journalism schools (EOPs) affiliated with the Ministry of Information and Tourism (in Madrid and Barcelona), another school linked to the Catholic Church and associated with the University of Navarre (in Pamplona), overseen by Opus Dei, and a school at the University of La Laguna on the island of Tenerife in the Canary Islands. Admission to those schools took place by means of a competitive exam, and their academic programmes took four years to complete, including classes divided between general subjects and those focused on initiation into professional practice. That model later shifted to a different one oriented around media studies departments, a fiveyear curriculum, and diversification into three specialities: journalism, advertising, and audiovisual communication. However, neither under that programme nor the previous one was the teaching supplemented by any sort of internship, and there was hardly any direct contact with any actual media organization. As an immediate result of this academic shift, the number of enrolees multiplied during subsequent years. For example, the last graduating class from the EOP in Madrid granted degrees to just over 80 graduates, while the first class

from the department associated with the Complutense University of Madrid produced almost 500 master's degree graduates. Before long, those new graduates numbered in the thousands, having passed through university departments distributed throughout Spain. This would end up coinciding, curiously enough, with the question of whether having a degree was an essential requirement for the profession, and very soon there was an ample excess of graduates as well as a context of increasing unemployment – or underemployment – which the economic crisis during the second decade of the 21st century would only worsen.

As the controversy raged on, there were media outlets that, persuaded by the debatable proficiency of higher education instruction, wanted to enter into the area of training either with or without the collaboration of a university, by creating their own schools offering a master's degree that, more or less surreptitiously, suggested the possibility of finding employment at the sponsoring media company. In order to access those programmes, possession of a university bachelor's degree was required – any would suffice – and after completing two full course cycles, with inperson attendance required, the degree was obtained along with, in most cases, an internship contract at one of the publishing group's media outlets. The first initiative of this type was launched by Grupo Prisa (publisher of *El País*), in this case in collaboration with the Autonomous University of Madrid, and was almost immediately followed by programmes offered by the other corporate media groups and firms. One relatively controversial aspect was that a degree in media studies was not required, but rather any undergraduate degree. However, this undoubtedly contributed to the disappearance of the

requirement to hold a press card granted by the government, since the professional associations began to simply require an employment contract or some other verification of the candidate's journalistic pursuits in order to join as a fully vested member and receive an accreditation document. In fact, the requirement to possess the official card was no longer applied even for the position of chief editor of a newspaper, in contrast to what had been established in the Press and Printing Act of 1966. That law – as explained above – had not been repealed or replaced by any other with a similar scope, which gave rise to no small number of contradictory judgments with respect to the liabilities of journalists, chief editors, and media outlets. In fact, it was the subsequent caselaw produced by the Constitutional Court and Supreme Court that adjusted the contents of that Act – which, again, was never formally repealed – to the contents of the Constitution of 1978 with respect to freedom of information and the complementary rights to dignity and privacy. Despite all this, the authors of a published text, the chief editors of newspapers, and only secondarily the publishing company, had continued to be subjected to criminal liability and, as the case may be, unfavourable rulings in the civil courts, via decisions handed down by judges who believed that the rights of someone mentioned in a news story had been violated. This was a very unusual anomaly in Europe, where no governments had dared to make such efforts to reign in the media.

Nevertheless, most media professionals continued to hold journalism degrees, whether earned via the corresponding university departments or from one of the EOPs (which continued to decline in importance) or in the form of one of the master's

degrees described above. The spectre of a feared intrusion by uncredentialled journalists, despite the fact that such a threat was clearly being played up by some professionals with obvious corporate objectives – soon to be a minority – does not seem in any way to form the basis for the increased unemployment that has taken hold of the profession in recent times. Instead, that can undoubtedly be blamed, firstly, on the proliferation of university departments and the high number of graduates they produce each year, but it has to no lesser degree been due to the crisis of survival that a good number of media sources have experienced, especially the print media, where circulation figures and sales have fallen off spectacularly in recent years. It is also worth mentioning, however, the emergence of a new *industry* providing employment for professional journalists: the communications firms and their counterparts in the form of corporate departments dedicated to such endeavours.

At the beginning of the period under discussion here, what were referred to at the time as press offices were mostly the exclusive property of the public-governmental sphere. Few companies and corporations had organised their own, and there were hardly any specialists on the subject offering their services on the market. This is not too surprising during an era intensely characterised by opacity and a plethora of obstacles to the dissemination of any type of information. However, the advent of democracy in Spain and the subsequent changes to the economic-corporate fabric caused the field of communications to become one more tool for management. As such, large and medium-sized companies decided to organise their own communications departments, almost always entrusted to active journalists, who were mostly

attracted by financial terms of employment that media outlets did not tend to offer. At the same time, all the public bodies were doing the same, as they gradually multiplied in number due to the process of the devolution of power that followed the establishment of Spain's autonomous communities under its Constitution. Moreover, in addition to the regional governments of those 17 autonomous communities and their corresponding parliaments, an extensive clustering of organizations, agencies, and companies or pseudo-companies were coming into existence throughout the country that depended on those regional governments and/or their more local counterparts. In one way or another, thousands of jobs were being created, along with the emergence of a new industry of intermediaries who acted as the link between public entities and private companies or media outlets. The relationships between those two groups, despite the *revolving doors*, has never been an easy one, although this has not prevented – in fact it has done the opposite – a significant portion of the content appearing in the media from originating in content produced by communications departments, rather than representing the independent work of professional editorial offices. This has undoubtedly been the source of the broad coincidence of content among the various types of media, which tends to commonly be referred to as their *agenda*, around which the portrait created of current events is made to revolve.

Whether admitted or not, the chosen approach of many public and private agents in terms of their communications policy is more about avoiding information than providing it. And it is curious that most of these activities tend to be entrusted to professional journalists, many of whom go from reporting in one

medium to not facilitating, from the *other side*, the work of their colleagues, without interruption. Beyond any other considerations, this has had very appreciable effects on the profession as a whole. It has caused established journalists with verified value in the media to stop exercising their profession in that field, in many cases attracted by clearly disproportionate pay packages, but in other cases spurred by the difficulties imposed upon their work by the publishing companies that had employed them. As is to be expected, and even at the risk of becoming repetitive, this phenomenon has been nothing but growing since Spain's economic crisis, or to put it a better way, since the publishers' response to that crisis, which almost exclusively focused on imposing salary cuts and precarious employment conditions in editorial offices.

Going back to the somewhat spurious debate over degrees and qualifications, the controversy was never really resolved, nor was the heart of the matter ever even addressed: professional education for journalists. It is useful to begin by posing a question that may be impossible to answer, at least to the same degree as it is for any other profession: is a journalist born or made? The first step is to establish whether the trade can be learned, or can be taught, in any manner beyond practising the profession itself. But perhaps this is also just another way of losing sight of the question, because although it is true that the performance of journalism these days requires some level of mastery of certain aspects of the technologies that make the production of online media sources possible, or even those related to use of audiovisual tools, it cannot be overlooked that these are merely aspects related to tools, not to the basic

essence of the trade: reporting, interpreting, and communicating. The question should therefore be: what is needed in order to succeed with that mission? The truth is that there is no easy answer. Broadly speaking, it could be said that communicating news about a particular subject requires, or in fact demands, sufficient knowledge of that subject, but unfortunately this is still just another simplification.

As strange as it may seem, especially in view of the recurring imposition of corporatisation upon journalists as a whole, the movement promoting professional associations has had, and still has, hardly any impact on the development of journalism. It scarcely had any impact on the controversy regarding degrees and press cards as discussed above, but neither has it shown much of a presence with regard to other aspects, especially if compared to what the professional associations formed in relation to other *specialisations* represent, even today. The history of professional associations for journalists dates to the end of the 19th century, and even though their history has evolved in certain aspects, the basic essentials have remained in place until today, without any excessive alterations over the course of the last four decades of journalism. One of the oldest associations was organised in Madrid way back in 1895, and it has maintained a substantial portion of its basic characteristics[12] during its more than 100 years of existence, with significant membership among professionals from that region. From the beginning, associations were being organised as regional in nature, occasionally provincial, but in 1922 a decision was made

12 Víctor Olmos. *La casa de los periodistas* (*The House of the Journalists*). Asociación de la Prensa de Madrid, 2006.

to group these together in order to span the entire country, thereby establishing a joint presence that was reorganised in 1984 to form the current Federation of Spanish Press Associations (FAPE), which is made up of 49 affiliated regional associations as well as 16 others that are industry-based, with a total of around 21,000 professional members. In addition, there are eight more formal professional associations (*colegios*), also regional in nature, which at some point in time decided to transform the original structure of those organisations. The FAPE carries out its activities by means of a variety of committees, which most notably include those dedicated to the subjects of arbitration, guarantees, and professional ethics.

Shifting now from the theoretical to the practical, the truth is that even long before the era of mandatory membership and professional registration required during the Franco regime, press associations have always had a focus related more to member welfare than corporate concerns. Without going too far back in time, for decades the main benefit they offered was access to an association's group health insurance policy, which later developed into special arrangements formed with Spain's Social Security department and public health systems. When some of those functions were transferred to the autonomous communities, asymmetries occurred among the various regions, until this resulted in the cancellation of those arrangements and the compulsory affiliation of all professionals with the public system, leaving any links to private insurance as voluntary, whether mediated or not through specific agreements with the professional associations involved. As a result of all this, and to a certain degree in parallel, in some districts the old associations

were replaced by the more formal professional associations mentioned above, more or less subject to the general regulations for this type of body. This is something that has largely contributed to a dispersal of efforts and a certain loss of opportunity to pursue an organised defence of rights within the profession, which is still just as necessary, or even more so, in these times characterised by such precariousness.

For those in the profession, this situation of neglect has left many unresolved problems to be addressed. There are old issues related to the failure to update the regulations described above, but there is no shortage of new problems as well, for example those related to the increasingly extensive status of *freelance* workers now demanded of those practicing the profession of journalism. For a good number of journalists, this is becoming their only opportunity to remain active, just as cases are also beginning to proliferate in which the performance of journalism is taking on the profile of a small business, with both options bringing with them the associated requirements related to labour and employment, taxation, and legal formalities. Another problem that is no less significant is the need to take collective action in order to defend the profession's reputation against the emergence of sources producing and distributing *fake news*, or the proliferation of sources imitating the media, but which are simply taking content from others without offering compensation in return. There is a definitive need to push back against all this, because it is creating confusion about what journalism actually means.

In professional matters, therefore, there is not enough of an appreciation of what is strictly work-related, subject to company agreements and the greater or lesser power of the trade unions, which are always ready to intervene in publishing issues. That reality does not reflect in the way it should the specific needs of an activity that combines characteristics more closely linked to liberal professions than to a simple work-salary relationship. Issues such as the conscience clause or freedom of opinion and information appear better protected for the average citizen than for the professional journalist. Does this constitute yet another anomaly in comparison to Spain's most immediate neighbours? Probably, yes.

Neither the aspect related to education nor that pertaining to professional associations can be, or should be, considered immaterial for purposes of professional practice. It cannot be denied that in recent times the practice of journalism has become characterised by a state of precariousness. The employment instability that has resulted from companies' reactions to decreasing circulation figures and profits has been especially focused on editorial offices, where the professional staffs have been losing weight compared to management teams that, although with a few exceptions, have often demonstrated insensitivity to a journalist's professional profile as a contributing element, if not to say a determining factor, in the quality of the content produced. In recent times, most of the major daily newspapers have been produced through the use of a profusion of *interns*, writers employed under a series of temporary contracts, and by piecemeal outsourcing to contributors, with every conditioning factor imaginable working in opposition to their

efforts. This has, firstly, been reflected in an appreciable decline in the *value added* contributed by that content and, still more importantly, a notable lack of potential resistance to executive strategies oriented only towards the interests of the publishing company. To put it another way, professionals are suffering from an incommensurate loss of their freedom to report the news, not just by political-legislative imperative, but by their situation of acute employment instability. An assessment of the sociological effects of this scenario is still pending for now, but those effects do exist, and they are, or will end up being, transcendent for society as a whole and for the democratic system itself, because accurate, free, independent media sources are an essential element of that system.

One part, although only one part, of the crisis faced in the media is a direct result of factors that could be considered external, such as technological changes and in particular the universal presence of the Internet. But factors that are strictly internal are also involved, essentially related to the prevailing business response, a portion of which undoubtedly consists of a growing subordination to political-corporate interests, that is entirely extraneous to the very essence of the industry: trustworthy, independent, and accurate reporting. Although things were not always this way, at least during a good part of the last four decades, they were.

III. From splendour to crisis

Without entirely rejecting the notion that when it comes to business, *the crisis never ends*, it is worth remembering that the media outlets that are now struggling to survive in a scenario full of difficulties and uncertainties were, not so long ago, experiencing times of undeniable splendour. As strange as it may sound today, newspapers were making money, quite a lot of money, up until about a decade ago. Not only did those profits lead to the accumulation of various fortunes, but empires were built which still exist today among the most wellestablished members of Spain's communications landscape. Again, the newspaper *El País* must be cited as an emblematic case. As a business venture that arose from out of nowhere in 1976, in just over two decades the publisher Prisa became not only the top communications group in Spain, but one of the leaders in the Spanish-speaking world, with a significant presence in the print media, radio, and television on both sides of the Atlantic. There were others as well – although with more modest fates and final destinies – that became established based on the success of a single publication, such as Grupo 16 with *Cambio 16* and Grupo Zeta with the magazine *Interviú*. There were also those that became established by means of a lengthier family-built route,

but that consolidated and even expanded positions that, with a greater or lesser degree of success, allowed them in the worst of cases to maintain their earlier status in the market. This is the route exemplified by families such as the Godós (*La Vanguardia*), Reys (*La Voz de Galicia*), Jolys (*Diario de Cádiz*), and Yarzas (*El Heraldo de Aragón*), and in Basque Country (*El Correo Español*), which was ultimately associated with the Luca de Tena family (*ABC*) at Grupo Vocento. Nor was there ever any lack of incursions from other fields of business, as will be discussed again a little later, such as in the case of publishers like Planeta (Atresmedia), Anaya (*El Sol),* and Javier Moll (Prensa Ibérica), production companies such as Mediapro (*Público*), and even organisations such as the National Organisation for the Blind (ONCE). Similarly, undoubtedly attracted by the *glamour* of the printed page, controversial figures such as Javier de la Rosa and Mario Conde, among others, launched their own attempts to gain a position. There were also a variety of efforts to enter into the Spanish market sponsored by foreign groups, such as Bertelsmann, Pearson, Hersant, and Televisa, to name just a few, although if truth be told they did so with patchy success. The Italian firm Mediaset, headed by the always controversial Silvio Berlusconi, is the only one managing to maintain a solid position today.

The ups and downs experienced by *El País* following its inception were on several occasions at the point of derailing the project. The idea for launching the newspaper had arisen at the beginning of the 1970s, promoted by a group of intellectuals and professors linked to the publisher Alianza Editorial and the magazine *Revista de Occidente*, with José Ortega serving as a central figure, and with a predominantly neoliberal-conservative ideology. At the

beginning, one of its basic tenets was to keep ownership diluted to prevent positions of full control, in order to maintain absolute plurality. Its series of attempts to obtain the required government licence met with official rejection, which although not perceived at the time, would surely end up making a notable contribution to its subsequent success. Regardless of whether or not it represented a reaction to the government's opposition, its promoters decided, as a first phase, to seek and obtain political support from Manuel Fraga, who at the time was heading the Spanish Embassy in London. Although he had not yet cut all ties with Francoism, he had begun to position himself as the leader of a sort of tepid openness after Franco's death. Either before or after that occurred, several of Fraga's incipient party members decided to join the editorial project, believing that it could become the journalistic platform for supporting the aspirations of the former Minister of Information. This is something that soon came into conflict with the foundational philosophy of the group that had coalesced around Ortega, which was entirely averse to anything that could form any nucleus for control. The main difficulty, however, was that the funds that had been raised did not ensure sufficient financial solvency to launch the periodical. This eventually led to the addition of another successful editor, Jesús Polanco, who had built a conglomerate called Santillana specialising in textbooks. That enterprise had flourished with the enactment of the educational reforms introduced under Education Minister Villar Palasí and with the implementation of basic general education (EGB), with the presence of Ricardo Díaz Hotchleiner as a member of the minister's team, who would later become a partner of Polanco and a board member at Prisa, the publisher of *El País*. Whether true or not, there is a version of the

story according to which Polanco put up the millions that were required to purchase the rotary press used to start up the newspaper. Commitment to that transaction apparently took place at the 'house of the seven chimneys', which was the corporate headquarters of what was then Banco Urquijo, during a meeting organised by that bank's general director, Gregorio Marañón. One condition agreed to at that meeting was that Juan Luis Cebrián, at that time the deputy chief editor at *Informaciones*, would be appointed to lead the project, and that Javier Baviano, one of Polanco's trusted associates, would be brought in as managing director to handle the business side of the operation. It was said at the time, and it has never been denied afterwards, that both those requirements were imposed by Polanco before he would commit to making his contribution, which is one that certainly made him the newspaper's first shareholder, although without having a controlling stake. His incorporation into the project would in any event become decisive for at least three reasons: financial solvency, management skills, and reorientation of the professional team.

It is worth mentioning that the initial intention of the sponsors was to some degree meant to emulate the most intellectual journalistic experiments of the Second Spanish Republic. In keeping with this ambition, the first chief editor pursued was the writer Miguel Delibes, who had very successfully headed the newspaper *El Norte de Castilla*, a publication appreciated for having a standard of quality that was quite rare within Spanish journalism at the time. It was never really clear whether the illustrious academic took the proposal seriously, or whether the offer fell through because of his firm refusal to move from the

city of Valladolid to Madrid. There is better verification for the fact that, either seeking support from Manuel Fraga or perhaps at his suggestion, the newspaper's first chief editor, appointed in secret, was his close collaborator Carlos Mendo, up until the time when Polanco joined the project which, along with the notable influence of one of his bank backers – the now defunct Urquijo – tipped the scales in favour of Juan Luis Cebrián. It was not that Cebrián had credentials at the time that were much more *progressive* than those of Mendo, but he did contribute youth and verified experience in running a newspaper, while at the same time he was not personally or politically subordinate to any of the figures who were aspiring to play determining roles in the course of the Transition. To put it succinctly, the intention was to create a newspaper that belonged to *nobody*, compared to the evidence for a newspaper of *Fraga* that the other option would represent. Cebrián had maintained only a very few diffuse links to progressive Christian Democratic environments, and he had briefly acted as news director for *Televisión Española* during the period when Pío Cabanillas headed the Ministry of Information. At the time of his appointment, he was working as the assistant director of the evening newspaper *Informaciones*, which was relatively distanced from the official orthodoxy. Designated as director in February of 1976, *young Maura* – a nickname he was given by some of his staunch supporters in reference to a progressive politician in the midst of conservatives – went to work on putting together the professional team, resulting in an ideological profile that was clearly more progressive than the one that dominated among the sponsoring shareholders. This would lead to an endless number of conflicts that, about two years after the paper was established, would reach the point of almost

causing its collapse.

The appearance of *El País* shook up what was until then a relatively quiet media scene, while at the same time it provided incentives for the creation of other innovative projects, with the most relevant of these being *Diario 16*. This was launched at the initiative of the eponymous publisher of the successful magazine *Cambio 16*, initially sponsored by Juan Tomás de Salas along with 15 friends of various inclinations, but clearly all antiFrancoist, which is where the group got its moniker reflecting the number of founding partners. Salas, who was born in Valladolid in 1938, belonged to an aristocratic family (Marquis de Montecastro y Llanahermosa), and earned a doctorate in economic history at the Sorbonne in Paris. He was linked to the antiFrancoist People's Liberation Front (known as *Felipe*), but after hundreds of its members were arrested in 1962, he had to take refuge in the Colombian embassy before going into exile in Bogotá. He later ended up in France, where he worked at Agence France-Presse, and then moved on to London where he worked on the Spanish-language edition of *The Economist*. He eventually returned to Spain, and soon thereafter he founded *Cambio 16* in 1971. The success of that magazine in terms of readership and influence formed the basis for the group's incursion into other ventures, the most relevant being the launch of the newspaper *Diario 16* a few months after the first issues of *El País* hit the stands. The group would later come out with a variety of publications, although its persistent financial difficulties would eventually result in a series of upheavals and crises, until it practically disappeared in the 1990s.

Halfway between the final stage of Franco's regime and the first years of the Transition, a few other journalistic initiatives appeared that should be mentioned, the most notable of which was undoubtedly the expansion of Grupo Zeta. The publishing group was founded in 1976 in Catalonia by Antonio Asensio, who after publishing a variety of erotic magazines bordering on the pornographic, would have his main success with the weekly magazine *Interviú*. This would later form the basis for incursions into the area of political news reporting with the weekly *Tiempo*, until he eventually become involved in the daily press with the newspaper *El Periódico*, which had editions published simultaneously in Barcelona and Madrid, although ultimately the latter did not manage to gain a foothold. Grupo Zeta's decline, which began with a drop in circulation figures for most of its magazines, was accelerated after the premature death of its founder, until the company was eventually sold in a public auction after several attempts at restructuring.

Another emerging contender, although one with a shorter history, was Grupo Mundo, which was established by Sebastián Auger, also in Catalonia. Auger had previously collaborated with the notary Josep Maria de Porcioles, who for years was the Francoist mayor of Barcelona. That group increasingly built a presence in the journalism and publishing fields, but ended up in a state of absolute insolvency that led to criminal charges being pursued against Auger and his hasty escape from Spain. He later returned to practice law in Catalonia, where he was subject to the imposition of a oneyear prison sentence, although he only ended up serving two weeks of it.

Coming back now to the present day, the dominant view is, especially in relation to the traditional print media, that better times have all been left behind, not only in economic terms but also in relation to the media's influence and social penetration. To use a colloquial expression, it is often said that any other time was better than now. The truth, however, is that nobody has a clear idea of how to confront the evolution of the industry at the hands of technological progress and the changes taking place in society, perhaps because they have little faith in their own viability. What many may be unwilling to contemplate, and certainly not to assume, is that the reason underlying their current difficulties is partly based on faulty strategies and poor decisions, with a good dose of lack of foresight or, what is essentially the same thing, a belief that their positions were sufficiently wellestablished that they could manage the innovations that were beginning to emerge as they pleased. To put it another way, they may have thought that the market was *manageable* based on their positions, rather than considering the possibility – and to a certain degree the evidence – that it was not the market that would have to accommodate their interests, but rather the media that would have to adapt its offerings, as well as its behaviour, to the evolving needs of the market. In short, if the question that needed to be asked was whether supply dominates demand or viceversa, they chose the wrong answer, and to some degree they continue to do so.

The business response to the crisis facing print newspapers – i.e., *the paper* – reveals characteristics that are rather surprising. Although perhaps excessively abridged, it is nevertheless abundantly clear that two apparent inconsistencies can be

highlighted in the strategy adopted by the publishing firms: on one hand, a complete lack of innovation in relation to their products and, on the other, ongoing price increases in a context of falling demand. Neither of these seems consistent with the tenets of good management, but perhaps the main principle being flouted is the total loss of consideration for maintaining product quality as a differentiating competitive factor.

As far back as can be remembered, even beyond the last four decades, newspapers have been more or less identical in terms of their content, structure, and orientation. They have offered more or less the same sections and have structured their news and opinions in the same pre-established way, and what is most remarkable, they lay out the content, beginning with the front page, aiming to highlight the most current events… from the day before. It also so happens that they rarely, so as not to say never, cover issues that they themselves consider to be newsworthy, regardless of what has come to be known as the *agenda* determined by what happened during the last 24 hours, or what is expected to happen on the day of publication. Ultimately, a propensity towards what can be referred to as *quotation journalism* has become almost ubiquitous, that is, the strict and literal transcription of the statements made by a story's protagonists, who are directly or indirectly related to the newsworthy event or else simply assumed to be. What emerges as most visible, therefore, is a relative absence of anything resembling innovation. But that is not all: the potential ingredients of authentic *value added* that could be considered as unique to *the paper*, such as analysis, contextualisation, or even forward-looking anticipation, which are to a large degree lacking

among competitors characterised by immediacy, have not only not been capitalised on, but in most cases have simply not existed at all. The result is that newspapers stumble along, threatened by the fate of becoming a predictable commodity by offering material that potential audiences probably already know, accessed earlier via media such as radio, television, and the Internet. Between the cause and the source of all this, it is important to underscore the management orientation of the newspapers: failing to pay sufficient attention to that which could differentiate them – the editorial staffs – and as a result of this, the professional profiles of those who form them.

The flood of technological advances has given rise to substantial changes in production processes. This is the case even to the extent that newspapers today may even share the same printing plant, commonly developed computer systems, and printing and distribution schemes – although they may not always be optimised. So, their sole differentiating element is their content, or in other words, the product of the editorial staffs responsible for producing them. Nevertheless, this tends to be the ingredient least *cared for* by management, although perhaps it would be more appropriate to say that it is *punished* with particular care. There is no better evidence of this than the manner in which the labour force adjustment plan (ERE) used to lay off or suspend workers has been handled in cases which have become a ubiquitous feature of the business world during the last decade. Not only have such cases affected the editorial offices more than the other departments at the pertinent companies, they have also been configured with more attention given to the cost per employee than to qualitative aspects or professional profiles. The

tendency has been to eliminate any staff members who would receive a higher salary, even when this reflects greater seniority, which has logically resulted in a loss of potential in terms of the writing and editorial work. Instead, increasing weight and a majority presence has been given to professionals with less experience, recently graduated from the educational process and, as mentioned above, to interns, temporary hires, and outsourcing, often pushing the limits of the employment legislation when not entirely violating it. Among other effects, this results in the palpable renunciation or excruciating lack of appreciation towards maintaining the media outlet's capital as an essential asset – its quality – for retaining or consolidating its position in the market. It is not, although it may be easy enough to assume, a positive contribution to generating *value added*, or for competing against other newspapers or other existing media and news sources.

The other inconsistency mentioned seems no less important. Circulation and sales figures for newspapers have decreased by large numbers, in the order of 1 million copies each day on average since the first years of this century. Nevertheless, publishing companies have imposed several price increases while failing to implement actions to incentivise sales, with the exception of the rather debatable promotions discussed above involving gifts, giveaways, or discounted offerings of all types of items: trips, prizes, kitchen appliances, and the list goes on. Although there is room for further discussion of actions of this type, their almost complete lack of positive effects has caused them to be almost entirely abandoned. On the other hand, little or no effort has been made to, for example, facilitate purchases,

which continue to be limited to the monopoly held by the newsagents in Spain, even though, for a variety of reasons, the number of newsagents has been decreasing to the point at which they can no longer be found in vast expanses of major cities or in many smaller town centres either. It is always striking that there have not even been attempts to revitalise earlier efforts to encourage selling of newspapers in very accessible and crowded locations such as department stores, shopping centres, supermarkets, etc., which is common practice in other neighbouring countries. This would involve nothing more than applying the principle of making it easy for consumers to buy the product, by paying attention to their consumption habits and preferences.

However, as discussed above, the current solvency crisis of the print media, and particularly newspapers, is largely the result of business decisions taken during recent years that, in various ways, have eroded their financial structures, bottom lines, and in the end, threatened their viability and compromised, if not undermined, their independence. It is worth mentioning at least three aspects, which can be added to any already discussed above: incursion into the multimedia environment, changing characteristics of publishing companies, and responses to the emergence of the phenomenon of online information.

III.1. The multimedia myth

About halfway through the 1980s, the sector inoculated itself with the virus of multimedia, perceived and largely assumed as the only way to maintain presence and influence in the communications market. This perspective especially affected newspaper publishers, who became convinced that they *had to* have the full availability of some sort of radio network and, especially, a television network. What made this possible was undoubtedly the progressive release of access, or to put it another way, renunciation of the government monopoly, which had especially characterised the situation with television. The starting gun was fired by a socialist government at the end of the 1980s, which began to create opportunities for companies to compete against the central government's *Radiotelevisión Española* and the incipient regional networks, all of which were characterised by public ownership and territorial monopolies. This soon took the form of numerous competitive tenders for awarding frequencies and broadcasting licences for both radio and television, with a variety of territorial scopes: nationwide, regional, and municipal. For various reasons, this changed the media landscape, and would go on to, in some cases, seriously compromise the viability of corporate groups that had caught this contagious obsession.

It may be worth the effort to insert a paragraph here about public oversight of audiovisual activities. For decades, broadcasting systems in Europe were restricted to publicly owned networks, and private initiative was simply prohibited in terms of

access to radio and television frequencies or networks. The first exceptions were allowed on the radio, with the emergence and consolidation of private companies, but nevertheless, most European countries – and Spain too of course – maintained one public network with clear privileges in terms of broadcasting power and territorial scope. The opening up of television took quite a bit longer, almost until the last third of the 20th century, and it took place quite erratically in the various countries belonging to what was then the European Economic Community (EEC). The elimination of the monopolies came in different forms, and only in some cases was it accompanied by the full or partial privatisation of the public networks. On occasion, it took place simply via the course of events, circumventing the intentions of government authorities and taking advantage of loopholes allowed by the legislation. One particularly illustrative case took place in Italy, where the man who would later become the head of the country's government, Silvio Berlusconi, took advantage of the authorisation granted to develop local television broadcasting to eventually, and surreptitiously, connect a series of such stations to configure a nationwide network. This was the start of his media empire, which would later have an active presence in the Spanish market through Mediaset.

Although some peculiar characteristics were associated with the political panorama, the situation in Spain at the beginning of the Transition was not so different from the one prevailing in the rest of Europe. There were a several privately-owned radio networks, although they were still obligated to yield to significant participation by the central government, including veto power and serious technical limitations on regional broadcasting. There

was also an absolute prohibition against the production of news programmes – with stations forced to connect directly to *Radio Nacional* at various times during the day to broadcast the news reports the public broadcaster produced – the socalled *partes* or news briefs. Although it is true that in the final years of Franco's rule some broadcasters were producing news bulletins known as *pinitos*, this reflected only a relative tolerance for news that was strictly local in nature. It is also noteworthy that this prohibition did not include any restrictions when the subject involved sports or *cultural* topics. The public presence on the radio was nevertheless broad and diverse, both in terms of the number of broadcasters-networks and their territorial range. *Radio Nacional de España* (RNE), which was part of the public entity *Radiotelevisión Española*, was broadcasting a variety of programmes, with frequencies on the spectrum and antennas that more than sufficiently covered Spain's entire national territory. The government also maintained exclusivity for shortwave broadcasting via *Radio Exterior de España* (Spanish Foreign Radio), which was broadcasting programming in multiple languages on six continents. There were also four other publicly owned networks: *Radio Peninsular* (RTVE), *Red de Emisoras del Movimiento* (REM), and *Cadena Azul de Radiodifusión* (CAR), all of which were affiliated with the General Secretariat of the National Movement, along with a small number of broadcasters linked to the trade unions. This resulted in an enormously disproportional balance of public signals compared to private ones, with the most important private broadcasters being *Sociedad Española de Radiodifusión* (SER), which had a range of local broadcasting affiliates under a variety of ownerships, and the less powerful broadcasters with signals that covered only a

small portion of the national territory: *Cadena de Ondas Populares* (COPE), which belonged to the Episcopal Confederation, *Rueda de Emisores Rato*, and *Cadena Intercontinental*.

Since the mid-1960s, television had been limited to the two networks run by RTVE, known as *La Primera* and *La 2*, which offered nationwide programming as well as small, discontinuous broadcasts in some regional capitals that featured more local content. These were operated as a government entity: their general director was appointed by the Council of Ministers and they were subject to the authority of the Ministry of Information and Tourism. As mentioned above, none of this was very different, even in terms of its design, from the prevailing situation in most of the EEC at the time.

In order to interpret this government monopoly over radio and television broadcasting, it is useful to go back to the First World War, and especially the Second World War. At the beginning of both of these conflicts, television was practically nonexistent, but the governments of the countries fighting in those wars were becoming increasingly and deeply concerned about the news that was being distributed through the media in each country in view of its importance in terms of the civilian morale and the way that such morale was transferred to the various battlefronts. Already from the earliest years of the First World War, this concern led to various degrees of intervention – censorship and control – in relation to the stories being told about the war, both on the radio and in newspapers, and the majority of that intervention persisted in the between-war period. When the Second World War

began, the conviction that news reporting was a powerful wartime instrument encouraged the imposition of stricter controls from the beginning, both over radio and the recently developed cinema newsreels, which might be considered the precursors of televised news reports. Once the war had ended, European governments tended to believe that radio should remain under public control and ownership. As a further development of this notion, television was also thought better off in the hands of the state, and to an even greater degree because its potential influence on society was presumed to be much more significant. This approach was also invaluably supported by the fact that the broadcasting spectrum was considered to be a *public asset*, with the need to organise its use even via technological agreements of a supranational scope. Regardless of whether this was the reason, many European countries imposed, and some still maintain, a specific tax on possession of a radio or television. This was never the case in Spain, although on several occasions the possibility of implementing such a tax was considered, always in view of the heavy demands made on the national budget by public radio and television broadcasting.

It is worth remembering that even today, radio and television broadcasting activities require the use of specific airwave frequencies, which are subject to government concessions granted on a temporary basis, in accordance with contracts and legal provisions that leave a high degree of discretion in the hands of the governments. What this means is that despite the limited duration of their validity, with the political power to renew them or submit them to a new tender, they may be revoked during their period of validity on the grounds of non-

compliance and in any case not extended until the end of the period set by the administration that granted them. Although it cannot be denied that the advancement of political dynamics has been doing away with the theoretical need for public oversight for both radio and television, an even stronger effect is being exerted by technological changes that have rescinded governments' power to intervene, especially the pervasiveness of the Internet and the expansion of broadband networks.

In this, as with so many things, the future seems to be destined to produce a scenario that is different from what has predominated up until now, with the determining role of access to the spectrum diminishing rather than increasing. At the present time, the prevailing trend has already become quite evident: increasing access to audiovisual media outside of the traditional broadcasting channels. The case with television is crystal clear: it is increasingly being *used* via the Internet. This is the case not just for the paid platforms and streaming services – although it is especially the case for those – but also for viewing of the generalised networks that broadcast over the airwaves in the modality referred to as digital terrestrial television (DTT), and which are accessible online at the same time. It is therefore easy to imagine that at some time in the future, television broadcasting will no longer require the licensing currently mandated by legislation, and in fact, there are already several television networks broadcasting without any licence, via the Internet only. Actually, public policy has in certain ways already begun to shift along these lines, given the propensity to free up portions of the spectrum so it can be made available for the development of mobile telecommunication networks like 4G, 5G,

etc., which is also being accompanied by the imposition of substantial fees as a way of increasing tax revenues. The trend is therefore moving towards the true deregulation of audiovisual activities, so that access can be gained in a manner identical to that already existing for all other types of media. As mentioned earlier, this progression is taking place at an accelerated speed in relation to television, but a similar trend can also be seen taking place more slowly for radio, with a growing number of broadcasters existing exclusively online while consumption of the conventional networks also increases with expanding use of the *podcast* format for listening to their programmes. This trend in the audiovisual market, towards a sort of *à la carte*, individualised access – this will be discussed again later – is clearly a direction detrimental to use of the spectrum as a tool for governments to grant conditional, and therefore discretionary, access to agents in the sector.

Continuing with the examination of the Spanish case in particular, the challenge represented by relaxing controls and introducing plurality into the public media was strangely enough never taken up by a supposedly neoliberal government led by the People's Party (*Partido Popular* or PP), and much less so by its predecessor led by the Central Democratic Union (*Unión de Centro Democrático* or UCD). It was instead the first socialist government, headed by José Luis Rodríguez Zapatero, that took up this challenge. Their initial idea was to assemble a committee of experts that would propose a new model for RTVE, although like so many times before, in the end its conclusions and recommendations were not really significant in terms of the changes eventually introduced. The main internal consequence

was the modification of the system used to designate the organisation's top manager, which would end up being applied only in theory,[13] along with the implementation of a process intended to streamline its structure, which resulted in an labour force adjustment plan (ERE) that reduced the amount of its payroll for staff members by about 25%. It is worth mentioning, by the way, that the terms applied to that ERE were in fact the most *generous* in recent history, even more so than those applied during similar processes carried out for industrial sectors subject to restructuring during the 1980s. It is also useful to point out that by the time a few years had passed, the public media's staffing was practically back to its full size, again reaching a figure of more than 6,200 employees. This can be compared to the figure for its direct private competitors, which remained several times lower, with only the publicly owned regional outlets documenting similar numbers. Nevertheless, a very relevant change had taken place in the sector.

Under sustained pressure from the private operators, and in the wake of a series of complicated, drawnout negotiations, the administration led by Zapatero agreed to emulate the approach adopted in France to limit – or in reality eliminate – the advertising revenue raised by TVE. However, although the approach taken in Spain was not an exact replica, it does not seem as though the differences between the French and Spanish media sectors were taken into account, and nor were the undesirable repercussions of the French measure that were

13 No head of RTVE had been appointed *outside* of the Council of Ministers or in the use of an absolute majority in the Congress of Deputies, and this is the same approach that has been applied for the top executives at the rest of the public audiovisual entities.

already coming to light. On one hand, this shift came in response to a longstanding complaint from the well-established private networks: broadcasting advertising on public networks represented a type of unfair competition, since the funding public broadcasters needed to operate, as well as coverage of any shortfalls they incurred, were guaranteed by contributions from government budgets, and they could therefore offer *below-market* advertising rates and better terms. Assuming this reasoning was solid, a decision was taken to establish a full prohibition against advertisements on the TVE networks, although nothing similar was decreed for the other publicly owned channels, including the regional ones. As expected, this gave rise to a significant shortage of revenue for staterun television, which had to be compensated by larger budgetary contributions or through the development of supplementary channels of funding. The latter option was chosen, and was based on a compulsory contribution from private broadcasters proportional to their advertising revenues, along with a specific tax levied upon telecommunications operators, regardless of whether or not they had any presence in radio or television. At the same time, and as an intended part of the restructuring of RTVE mentioned above by means of its conversion from a public entity into a commercial company, mandatory balanced-budget rules were imposed upon its board of directors. However, actual implementation of the theoretical design was somewhat relative to say the least, because on one hand, TVE continued to bring in advertising revenues in the form of what was referred to as *cultural sponsorship*, while it also continued to close its financial years with appreciable deficits, despite the annual contribution earmarked in the general state budgets. Those shortfalls were

still covered or supported by the country's treasury, without any palpable consequences for the organization's management bodies. Membership in those bodies, by the way, remained subject to political distribution, beginning with the CEO who was now chairman of the corporate group, and who on the three relevant occasions after the supposed restructuring, had been directly appointed by the government in power. The most recent revamping of this procedure, promoted by socialist Prime Minister Pedro Sánchez, has now established that this appointment will take place via a public competitive call for applicants. However, the design has failed to impose even the minimal principles of competition, since the candidates were preselected and a committee primarily appointed by the government itself was responsible for proposing the final shortlist to the Congress of Deputies. Moreover, in order to complete the procedure, the candidate selected had to have the support of 60% of that lower house of parliament, which would suggest the need for an agreement among the political parties to produce a potential majority, and which in any event could lead to threats of blocking if the required majority was not met, and with direct appointment by the government in power if this occurred. In fact, the current chair of the corporation's board holds the status of sole director, and her term has already greatly exceeded the *provisional* period for which she was appointed.[14]

Returning now to the first step by which the television market was liberalised and opened up to private competition, it is appropriate to again mention the socialist government of Felipe

14 Rosa María Mateo was appointed the sole director of RTVE on 27 July 2018.

González, which in 1989 put an end to the monopoly that had been held by *Televisión Española* up until then and shared only with a couple of regional public networks limited to broadcasting within their specific autonomous communities – at that time Catalonia and the Basque Country. To this end, González decided to open a competitive call for proposals for the granting of the only three broadcasting licences being made available for other networks with nationwide coverage. In general, this multiplication of options within reach of the public sounded good. A more pluralistic offer, along with more open competition, would theoretically result in benefits for the people. However, translation of that theory into practice, as will be discussed further below, did not exactly play out that way. In part, but only in part, this could have been due to the actual implementation and conclusion of the method chosen: a presumably open competition to apply for the concession, which would be granted to the proposal ranked highest by the awarding government body.

The legal basis for those competitions was found in the ongoing status of a *service in the public interest* given to audiovisual media activities. This is something that, although debatable from a legal perspective, has been continually backed by the courts, including those with European jurisdiction, in allegiance to the tradition of control over radio and television exercised by national governments which arose, as explained above, during and after the Second World War. Nevertheless, the reality is that the decisions made in relation to the various calls for tender, including the very first, were by no means free from controversy, largely due to the clear element of discretion applied to the granting of the concessions awarded. To be fair, that discretion

had already been *suspected* when the specifications for those tenders were published, regardless of how well they were initially accepted without objections by the candidates. It is sufficient to examine the identity or identities of those to which the required licences were granted on each occasion to discern a fairly obvious *closeness* between those awardees and the political party holding power in the administration that awarded them. All of this has rather transparent undertones: the desire to have affiliated media sources available, willing to give theoretical and political support to the government in power at the time. Each executive, whether at the central, regional, or municipal level, either supplemented or aspired to supplement the support already obtained from the directly controlled, publicly owned media – given the fact that radio and television broadcasting was available at almost all levels of government – by also taking advantage of *private* media outlets. It is a separate matter to consider the commercial, operational, or even political results of each concession awarded in terms of its subsequent development.

Firstly, and perhaps most essentially, there has been the issue of bias in the competitive tendering procedures, as described above. Secondly, and no less importantly, there was a lack of definition of a comprehensive plan for assigning spectrum frequencies, not only in order to avoid the possibility of market saturation, but also to avoid overlapping bandwidths and the consequential signal interference. This has caused the resulting situation to be very different from the initial intentions. In addition, there was the government's ineffectiveness in preventing or shutting down *pirate* broadcasters operating

without authorisation. Although their number has varied over time, during certain periods there were more than a thousand broadcasters on the radio and a few dozen on television operating illegally, in many cases interfering with or even blocking the signals of those who had obtained the required licence. This represents just another case where, unfortunately, there was reciprocal refusal among administrative entities to take the blame. This, it must be said, included the judiciary as well, with an abundance of legal actions in the courts preventing the closure of illegal facilities by Spain's Civil Guard. In any event, it has always been a *mystery* how the *pirates* managed to survive financially, with some continuing to do so even up until the present day.

Returning now to the details of the first competitive call for tender for the granting of the three new nationwide television concessions, that process ultimately awarded one licence to a group led by the Italian Silvio Berlusconi and Spain's National Organisation for the Blind (ONCE), another to a consortium headed by *Antena 3 de Radio* (Grupo Godó) and a group of Spanish businessmen, and a third granted based on a proposal for mixed broadcasting – open access and paid, although this was not an option included in the specifications – submitted by Grupo Prisa, the publisher of *El País* and owner of the SER network, and the French *Canal Plus*, among others. A few months later, their broadcasting began under the names of, respectively, *Tele 5*, *Antena 3*, and *Canal +*, with the last of these, by the way, being the only one that would not be affected by changes to its shareholding structure in the subsequent years. One change that did end up occurring was the introduction to the management of

the *Antena 3* network, who considered themselves discriminated against during the initial call for tender, of Grupo Zeta, led by Antonio Asensio. This change was derived from the situation in which one of the primary restrictions imposed during that first tendering process was to exclude the possibility of any shareholder possessing more than 25% of an applicant company's share capital. This was a requirement that not only seemed to be evaded in some cases by the suspicious presence of shareholders assumed to be acting as frontmen, but also one which ended up in *de facto* elimination soon thereafter, despite the government's ongoing power to decide whether or not to authorise a company's broadcasts.

Years later, simultaneous with newcomers to the television landscape, often in the form of public channels launched by autonomous communities creating their own networks or adding new ones, the central government decided to grant additional nationwide concessions. One after another, the regions of Galicia, Andalusia, Madrid, the Balearic Islands, the Valencian Community, the Canary Islands, Extremadura, Aragón, Murcia, Castile and León, La Rioja, and Castille-La Mancha had been establishing public networks, while at the same time *TV3* in Catalonia was augmented by *TV33* and the Basque network *ETB* created *ETB2*, broadcasting in Spanish. This *appetite* for television became a trend that was also followed by many municipal governments, which began to offer their own localised broadcasts either under direct operation or as a public-private hybrid. Public calls for tender were also held to grant licences to private groups, in order to allow broadcasting within the territorial scope of each awarding government.

The final step – at least for now – was one taken by the socialist government led by José Luis Rodríguez Zapatero in 2005. This occurred first in the form of tendering for the granting of two new licences with nationwide coverage, then later, by enacting regulations requiring conversion of analogue television to digital (DTT). The first of those steps took place via an openaccess call for tender, which ultimately granted broadcasting authorisation to a group led by the production firm Globomedia, associated with the Mexican network *Televisa*, with shareholding by two groups headed by the actor Emilio Aragón and Catalan businessman Jaume Roures. This situation was one in which the shareholders of Globomedia also included some people known to have personal relationships with the prime minister, such as José Miguel Contreras and family members of the Secretary of State for Communication at the time, Miguel Barroso. As part of that same tendering process, authorisation was given to allow the licence previously obtained by Sogecable (*Canal +*) for mixed modality broadcasting (open-access/paid) to be converted to one for fully open-access broadcasting. The first of the new concessions began broadcasting under the name *La Sexta*, while the other became known as *Cuatro*. Shortly thereafter, in a very controversial decision that would end up in the courts, the central government decided to grant the new *multiplex* authorisations for broadcasting in digital mode (DTT) to those who already held a licence, without any competitive tendering. This closed the door to the possibility of new contenders while allowing those already established to consolidate their positions by adding specialised channels to their more generalised offer or by leasing multiplex channels they were not directly using to

third-party networks. The evidence showing that DTT is in reality a transitional technology also seems to have had no impact on the government's design for the sector.

All of this related only to the holders of television licences, with no mention of the possible anachronism of considering the audiovisual sector to be limited to broadcasting over the airwaves, overlooking the progressive pervasiveness of online sources under circumstances in which a clear threat of saturation could be perceived even from the calls for proposals for the associated tendering. This has resulted in a twofold process of options becoming more concentrated while also disappearing, with a significant number of media sources immersed in a state of absolute precariousness and threats to their ongoing existence. The case of television is illustrative, but it is also worth the trouble to consider radio, taking into account its importance as a means of communication and the impact it has on society.

It soon became apparent that the resulting television landscape faced serious obstacles to its survival. The first step towards modification was seen in the Zapatero government's willingness, as mentioned above, to yield to the recurring pressures from private operators to restrict advertising on the public networks. A second – logical – response was seen in the consolidation of the companies operating in the sector. As such, Mediaset (*Tele 5*) took control over *Cuatro*, while Atresmedia (*A3TV*) acquired ownership of *La Sexta*, thereby establishing a sort of private duopoly in the television market, to the point where those two groups had been able to collect around 85% of the total amount invested in advertising in that medium. There were still a few *independent*

networks that persisted outside of that duopoly, with some of them having leased a *multiplex* channel after analogue broadcasting was abolished in 2010. Most of the privately-owned networks that survived were linked to a communications group with a presence in other media, such as in the case of *8TV*, which broadcasts in Catalan and is owned by Grupo Godó (*La Vanguardia*). The public networks, leaving aside the case of TVE, survived on generous subsidies from government budgets, which were used to supplement advertising revenues that were declining as sharply as their audience numbers, with the sole exception of *TV3* in Catalonia, which maintained a stable market penetration, perhaps influenced by the dynamics surrounding the independence movement which has become particularly active in that region since 2015. However, the actual amounts of the budgetary contributions made to regional networks is part of the lack of transparency that, in other areas as well, tends to surround the activities of the media. The Commission on the Telecommunications Market (CMT), which was the central government's regulatory authority in the past and has now been subsumed within the National Commission on Markets and Competition (CNMC), issued several annual reports that discussed the regional networks' resistance to complying with requirements to specify the exact amount of income they obtained from public sources, to add to or supplement the figures appearing in the budget of the pertinent regional government. The oversized infrastructure perceived to exist at most of those networks led to suspicions that the actual outlays from the public coffers did in fact exceed what was reflected in those budgets, but only in one case, that of *Canal9* in the Valencian Community, was there a decision to shut down a network on financial grounds. That took

place in 2013 under the People's Party government then in power, but more recently in 2016, the succeeding government formed as a coalition between the socialist PSV party and another party known as *Compromis*, formerly one of the groups comprising the populist *Podemos* party, made a decision backed by the regional parliament to reestablish it, although this has not yet occurred.[15]

For the public, the multiplication of options within their reach undoubtedly represented good news, and it was received as a guarantee of plurality. However, there are *two sides* to every coin, and there was another side to that more visible one. This can be clearly scene in the scenario of the government in power at any given time having absolute control over public broadcasters, which none of the parties occupying the country's top position have passed up the opportunity to exercise. Perhaps this has been the source of the notable downward trend in viewership figures, to the point at which penetration has become almost marginal in some cases, even below that of the competing specialised channels in the market. Openness to the emergence of new televised options has never led the governments in power to renounce the use of their authority in any way. It is therefore not surprising that these activities remained – and still remain – under the classification of a *service in the public interest* as mentioned above, and therefore subject to a system of administrative concessions under government oversight. For a long time, the competitive call for tender approach has been used to award licences, and this method has never been free from controversy at every stage, from the drafting of the

15 In October of 2019.

specifications up to the final decisions. This has harmed various aspects of the relationships between government and media, leading to both mitigation and intensification of criticism towards those in power, depending on whether or not a network has been favoured by the corresponding award decision. However, this was not the only effect of that other side of the coin which accompanied the generalised intention to expand the presence of news reporting via television.

Without overlooking the importance of other events or conditioning factors that arose later, the awarding of television licences, just as in the case of those made available to new regional and municipal radio broadcasters, brought with it the first cracks in the independence of journalism, which had been achieved with such hopefulness during the Transition. The eagerness displayed by the main publishing groups to get hold of one of the private television licences conditioned their editorial lines, although in some cases more than others, and it tended to mitigate or even cancel out, if only temporarily, the critical perspective they had previously demonstrated towards the political parties. Denied at the time but admitted later, the *modus operandi* in various cases – almost all of them in fact – was clear: to avoid conflicts with the government because it held power over granting of those television licences with a broad and palpable element of discretion. This lasted only for as long as it needed to, however, that is, only until the award decision had been taken, and after that, those who had been declared the winners and obtained a licence returned more or less to their earlier editorial perspectives, while the others, disappointed by their loss, began to voice their hostility, with more or less

accurate *claims* of favouritism in relation to those decisions, or of *political* discrimination against their own unsuccessful candidacy for a licence. The fact is that the media landscape changed substantially, so much so that it might be said that there was a perceptible before and after marked by the audiovisual concessions granted in 1985. Those not favoured by the granting of a concessions never became resigned to this, nor on the other hand did those in public power ever fail to perceive the power of the laws that gave them the authority to put a concession up for tender. Soon – as explained above – the central government began to consider the possibility of opening the market to new concessions, while intervening with greater or lesser degrees of discretion in the composition of the media groups already licenced, as the various regional governments carried on with their own competitive tendering procedures for assigning radio and television frequencies.

Shifting the focus now to the other audiovisual medium, the multiplication and diversification of radio stations during the last four decades has been spectacular, particularly in terms of the number of options for listeners. What has contributed to this, to a certain degree, is the proliferation of regional and municipal competitive calls for tender used to grant licences and allocate bandwidth across the entire FM frequency range. There have also been numerous initiatives undertaken by publishing groups, as well as an expansion of offerings by the large, already established networks. This has especially amplified the presence of what is referred to as *format radio*, that is, broadcasters offering programming content for a specific segment: from the most popular options dedicated to broadcasting various types of music,

to stations focused on sports, economics, culture, etc. Another more recent development is the explosion of broadcasters presenting their programming exclusively via the Internet.

The first transformation took place in the public sphere, with the regrouping of the central government's stations around *Radio Nacional de España*. This included the incorporation of networks that had previously belonged to other public entities, with the content restructured into several broad ranges: *Radio 1*, with general programming; *Radio 2*, specialised in classical music; *Radio 3*, with more progressive musical and cultural programming; *Radio 5*, focused entirely on news; and a relatively modest *Radio 4*, which only broadcasts in Catalan and whose range only covers the region of Catalonia. Of the previously existing networks, the *Red de Emisoras del Movimiento* (REM) was renamed *Radiocadena*, before disappearing in 1991 (although it was largely used as the basis for the configuration of *Radio 5*), and *Radio Peninsular* became subsumed into the frequencies currently occupied by *Radio 1*. Another relevant change was the restructuring of the shortwave broadcasting by *Radio Exterior*, which eliminated some of its programming in foreign languages, especially those oriented towards eastern European countries. At the same time, and coinciding almost exactly with the creation of regional television networks, Spain's autonomous communities were also configuring their own radio networks, to a greater or lesser degree emulating the experience of RTVE.

Private initiative was also being *transformed*. As the result of a first series of competitive tenders for awarding broadcasting licences with limited territorial ranges, various business groups

managed to either expand the territory they covered or to set up FM networks that covered almost the entire country. One of the most successful in terms of penetration and listener support was *Antena 3 de Radio*, but it is also worth mentioning the network initially known as *Onda Blanca*, later partially integrated into the current *Onda Cero*, as well as the increased power granted to the Episcopal *Cadena de Ondas Populares* (COPE). Also, in contrast to the generalised programming offered by all of those just mentioned, there was a proliferation of networks and stations exclusively focused on music, such as *Cadena 100*, *Kiss FM*, etc. Finally, there have also been some highly popular offerings developed under circumstances limited to a specific territorial range, such as in the case of *RAC* and *RadioTaxi* in Catalonia.

It is practically impossible to put numbers to the range of broadcasters that can now be tuned in to throughout the country as a whole, but as an indication, metropolitan areas such as Madrid and Barcelona have somewhere around 50 *signals* being broadcast, in many cases with serious problems of interference and overlapping frequencies. By the same token, it is also worth mentioning that in contrast to the technologically innovative approach implemented in the case of television, Spain's central government decided long ago not to promote, let alone impose, the development of digital radio, even though among other advantages it would allow the frequency bands for each network to be unified throughout the entire country and eliminate many of the risks of interference and signal loss. To put it simply: no rationalisation – as appropriate as it may be – of the radio landscape has been attempted by the government, nor from within the industry itself, nor are there any expectations that

such plans will be put in place over the short term. This may or may not have to do with the fact that the circumstances of the radio sector are substantially different from those prevailing in television. Whether this is because of the differing magnitude of operating costs or the greater dispersal of offerings, what is certain is that Spanish radio, in general terms, presents a picture of stable financial health, with positive bottom lines in most cases. Of course, this is not to say that there have not been more than a few ephemeral experiments and successive changes of ownership, as well as the inexplicable survival of some networks. Perhaps a good example of this can be seen in the case of a network that emerged during the 1990s called *Intereconomía*. In addition to being compromised by its incursion into the world of television and other media ventures, it has been forced to face a situation of insolvency the final resolution of which is still pending, but which has entailed several changes of ownership for some of its broadcasters.

In relation to both radio and especially television, it is worth pointing out that it was never clear whether the number of concessions, always limited, coincided entirely with the actual availability on the broadcasting spectrum. In the case of the central government, the exclusive initial concession of two openaccess television networks, and another under a mixed, partly paid (encoded) system, was determined by criteria restricted exclusively by *politics*, and not at all, as explained above, by technical limitations related to actual broadcasting. Regional concessions are a different story, however, as in many cases the regulated official limits were exceeded, with an abundance of cases of conflicts and saturation between adjacent

territories, and even within the scope of a single autonomous community. This was a situation that ended up becoming extremely complicated once the municipalities also entered into the concessions game, awarding licences to television and radio broadcasters with a range that was presumably municipal in scope. This ultimately resulted in a huge number of television broadcasts distributed throughout the country, which even included a good number of *pirate* signals not covered by any type of government authorisation or licence. One notable aspect here is that given the status of *public asset* attributed to the radioelectric spectrum, substantial portions of it are occupied by television broadcasts that, whether legally or often flagrantly illegally, offer only tarot card readers or advertisements for dating platforms, in addition to home shopping programmes. Another reality of the municipal media presence is that hardly any of the legally authorised broadcasters are privately owned or semi-public, with most belonging directly or indirectly to the local government itself. Only a minority offer continuous programming, with many instead limiting their presence to openaccess broadcasting of local festivals or advertising for scheduled local events.

Equally or more significant than the propensity described above for groups aspiring to obtain a television licence to tailor their editorial lines and news reporting to the views of the awarding government has been the unfavourable economic-financial impact that involvement with multimedia ventures has entailed for operators from the conventional press. Without entering into too much detail, the reality is that right now almost none of those groups have maintained their investments in the world of

audiovisual media. The most relevant case is undoubtedly that of Grupo Prisa, which has gone from possessing an openaccess network with nationwide coverage and a multisignal platform in the paid modality, to entirely abandoning television and only holding a controlling interest in *Unión Radio*, which owns the *Cadena SER* network, among others. In contrast, that group has managed to hold onto its audiovisual presence in Latin America, although in some cases because its plans to sell its interests there have failed, similarly to what happened in Portugal, where it had gained control of Media Capital, the country's main media group. Grupo Godó also still maintains a presence in television, although undeniably with patchy results. Compared to the relative success of its *RAC* radio, it has accumulated notable losses from *8TV,* its incursion into television in Catalan, to the point at which an economy of survival has already been put into place, with ongoing rumours about its potential disappearance. The experience of groups such as Zeta, Unidad Editorial, and Prensa Española[16] can only be described as ruinous, as their forays into the audiovisual world have caused them to lose significant amounts of funds, to the point of seriously compromising their survival as publishers.

A couple of decades later, almost nothing remains of the proliferation of television concessions and the associated anxieties provoked by trying to get one. Most operators who managed to obtain concessions progressively abandoned them, or in some cases, ended up having to lease them out in order to generate any revenue at all, even if insufficient to compensate

16 Publisher of the newspaper *ABC*, which has now become part of Grupo Vocento.

for the losses they accumulated during their various attempts at direct operation after the awarding. In fact, the nonpublic side of the television landscape here in the second decade of the 21st century is virtually limited – as explained above – to two large groups, Mediaset and Atresmedia, along with some others of an institutional nature, such as in the case of the Episcopal Conference which controls *Trece* through its radio network *COPE*, or some signals that are rather marginal such as those of Grupo Intereconomía and some regional broadcasters like the aforementioned *8TV*, owned by Grupo Godó. It is also worth pointing out that, apart from the consolidation of the two large private groups just mentioned – Mediaset, controlled by the empire of the Italian Silvio Berlusconi, and Atresmedia, led by the Planeta publishing group – experiences in television have been, and continue to be, somewhat disastrous, generating serious operating deficits. This is a scenario also faced by public broadcasters and networks, beginning with *Radiotelevision Española* and the various regional operators, although it has not represented any obstacle to prevent all of them, both public and private, from multiplying their channels and entering into segments focusing on specific themes.

To unravel the nature of the television landscape in recent years, RTVE maintains a variety of active networks, including *La Uno* and *La Dos*, which offer general programming, *Teledeporte* (sports), *Clan* (children's programming), *Canal 24 Horas* (news), and *Canal Internacional* (international). *Televisión de Catalunya* is offering a similar number of signals, with *TV3* presenting general programming along with *Sport 3* (sports), *3/24* (news), *Canal 33* (cultural), *Super 3* (children's programming), and *TV3*

International, all broadcasting in Catalan. In the Basque Country, Euskal Telebista has the channels *ETB1* and *ETB3* (in Basque), *ETB2* (in Spanish), and *ETBSAT* (international), while in the region of Galicia, Televisión Galega broadcasts *TVG1*, *TVG2*, and two other channels focused on Europe and Latin America, respectively. The situation in Spain's other autonomous communities is rounded out by *Telemadrid* and *La Otra* (Madrid), *TeleExtremadura* (Extremadura), *CyL* (Castile and León), *CMT* (Castille-La Mancha), *Aragón TV* (Aragón), *TB* (Balearic Islands), *TV Canarias* (Canary Islands), along with the recently reestablished *Canal 9* (Valencian Community). A seemingly endless variety of local public broadcasters should also be mentioned, most of them broadcasting fairly irregularly, sometimes only ephemerally, with some exceptions represented by continuous programming such as that provided on *BTV* (Barcelona), which is controlled by the municipal government of that capital city of Catalonia.

There are also two large private business groups that have added signals to their initial concessions. Specifically, Mediaset controls two networks with general programming, *Telecinco* and *Cuatro*, with the latter acquired from Grupo Prisa after the conversion of its initially semiencoded *Canal Plus* into open access, as well as various channels offering programming that is more or less thematic, some offering specialised contents or the rebroadcasting of programmes from its two main brands. This is the case with *FDF*, *Divinity*, *Energy*, *BeMad*, and *Boing*. Another example is Atresmedia, which has *Antena 3* and *La Sexta*, acquired from the Globomedia group, and the relatively thematic *A3Series*, *Neox*, *Nova*, and *Mega*. This multiplication of the

signals offered has not only resulted in the fractioning of audiences, which significantly complicates the metrics commonly used, but it has also encouraged the contracting of advertising spaces in blocks, distributed among the various options offered by each group, to the point where more than twothirds of the advertising investment in the sector is now captured by just two of those groups.

More recent innovations have come in the form of multiplication of the offerings in paid mode, whether via platforms such as *Movistar TV* or strictly via streaming as with *Netflix*, *Rakuten*, *HBO*, *Amazon Prime*, etc., all of which are focused on films and series, partially as their own exclusive productions. There are others such as *DAZN* dedicated to sports, which has shown a notable increase in penetration during recent months. Paid television has become practically the exclusive source of broadcasting for major sporting events, above all in the case of the most popular such as football and its various competitions, basketball (*Liga Endesa*, NBA, etc.), Formula One, Grand Prix motorcycle racing, and the major tennis tournaments (Grand Slam).

In response to this series of changes and developments, the generalist networks are exploring avenues of clear emulation, fundamentally via the Internet. Some noteworthy examples involve both Mediaset and Atresmedia, which have both launched *Premium* online services, where in addition to streaming options for their programmes already being broadcast via open access, they are offering advance debuts of some content and a specific subscription-only channel. Mediaset has even decided to venture

into the popular area of football programming, with an offering largely comparable to that offered by other multicontent or specialised platforms. Another scenario that is beginning to develop is based on agreements formed between new and established participants in the production market, above all in relation to original, exclusive series. This has occurred, for example, with the agreement just signed between Atresmedia (Grupo Planeta) and Telefónica (Movistar), while other similar deals may be in the works with *Netflix* or *HBO*.

Returning to the course of events during earlier years, the truth is that a significant proportion of the multimedia dream was fading away. Many companies that obtained licences, sometimes sacrificing their independence in order to get them, have demonstrated that what this brought with it was unsupportable costs that compromised the survival of their original medium. They began to retreat, shifting into reverse by giving up their dreams of establishing a multi-channel empire, and looking for a way to free themselves from the ownership they gained through concession awards. However, that was not so simple either. Since every administrative concession comes with a contract, they had taken on obligations they still had to meet, and they would need government approval to escape from those duties or even minimise them. In the end, this perpetuated the dynamics of complicity with political power that had been established before the competitive calls for tender for concession awards. The most successful method of retreating was to form an agreement with some cross-border audiovisual media group with little or no presence in the Spanish market, or simply by leasing out the spectrum assigned – something not at all expected when these

frequencies were awarded – along with the corresponding broadcasting licence. Nevertheless, both of these approaches required government approval, as mentioned above, and even if it was granted, there was a need for neutrality, or at least a lack of active protest, from the opposition. What would have been called *conspiracy* in the past therefore continued, although with greater losses of decorum among some compared to others, but sufficient so that the sector would continue to take on greater risks of seeing its credibility diminished.

III.2. Neither free nor popular

During the times of splendour, or when they were believed to be on the horizon, there was no end to the new initiatives being conjured up to capture overlooked portions of the press market with possible unlocked potential. Some participants focused on modalities that, although wellestablished in other locations, continued to be nonexistent in Spain. This was the case, for example, of newspapers distributed for free, which had high penetration levels in the Scandinavian countries. It was also the case of what was rightly or wrongly referred to as the *popular* press – the *tabloids* – which in places where they were established, attracted readership levels far above those of traditional newspapers. What cannot be denied is that almost all of these *new initiatives* ended up failing, with the respective media sources always on the verge of disappearing.

It was in the late 1990s when plans began to be made in Spain to introduce a press modality that was very popular in the northern latitudes, especially in the Scandinavian countries: newspapers distributed for free. Their essential characteristic, obviously enough, is that they have no cost for the reader, although that is not the only thing that differentiates them from what can be considered the traditional press. Another very notable contrast is their system of distribution outside the regular newsstands, concentrated above all in being *positioned* or *deposited* in crowded locations at times just before or at the beginning of the workday. Although this phenomenon was not entirely new, it took on special relevance beginning in the year 2000, coinciding with arrival of the new century – although that is not to say that it was in some way caused by it. The first step was taken by the Schibsted group from Norway, which jointly with several Spanish partners, launched the title *Madrid y M@s*, which was followed just a few months later by *Barcelona y M@s*. Then, just a year later, the Norwegian group acquired full shareholding in that publishing company and changed the title to *20 Minutos*, which was the name used in all other locations in a variety of countries. It then carried out a plan for expansion that would result in the publication of a dozen editions in various provincial capitals in Spain, while at the same time increasing its circulation in Madrid and Barcelona up to 300,000 and 200,000 copies, respectively. A few years later, in the midst of the rise of online versions of paid newspapers (2005), it launched its own website, *20minutos.es*, which was soon receiving some of the highest numbers of visits among the Spanish press sites. It is currently the only print media source surviving in its speciality, although it has also had to endure the consequences of reduced penetration in the market,

as well as other difficulties especially related to its forms of distribution. This ultimately led the Norwegian founder to sell the company to the Henneo group, publisher of the newspaper *Heraldo de Aragón*, among others. That company, owned by the Yarza family from Zaragoza, enjoyed a long media tradition, as well as close ties to Opus Dei.

The experience of free newspapers also had precedents in the Spanish market at the local level, being produced either for an entire municipality or, in the specific case of Madrid, at the scale of particular neighbourhoods or very specific geographic areas, such as the bedroom communities to the northwest or the mountainous region bordering the provinces of Ávila and Segovia. One of the oldest of these publications was probably *Claxon*, which was founded in the city of Tarragona in 1969. It used a door-drop delivery system, and contained brief stories on local current events. After several years of difficulties and some attempts to sell it, it finally became defunct in the summer of 2008. It does not seem, however, that those precursor initiatives had much to do with the multiplication of efforts made at the beginning of the 2000s to capture a market that seemed promising, when taking into account the low household circulation figures for newspapers in Spain compared to the rest of Europe.

Undoubtedly attracted for that reason, the Swedish publishing group Metro, founded in 1995 and with a presence in about 20 countries, decided to enter into the Spanish market in 2001 with the launch of *Metro Directo*. This took place by means of a very ambitious strategy that included editions distributed throughout

almost the entire geographic scope of Spain, both in the major provincial capital cities and in nearby towns, in direct competition with the pioneering *Madrid y M@s*. That experiment, however, ended in a state of enormous cumulative losses, and the company decided to shut down its operations in 2009 after failing to displace its most direct competitor. Whether this was the cause or not, it is likely that the accumulation of parallel initiatives, in this case by Spanish publishing groups, played a major role in the fiasco, although they all met with a similar fate and ended up going under as well.

The two most relevant ventures were led by the publishing groups Planeta and Recoletos, which were producing newspapers including, among others, *Expansión* focused on financial news and *Marca* dedicated to sports, as well as the magazine *Telva*. It was Planeta that had launched the free newspaper *ADN* in 2006, with editions for various locations in the country but especially focused on the Barcelona area, while Recoletos had introduced the title *Qué* on the market a year earlier in 2005, initially in 12 provincial capitals and their surrounding metropolitan areas, which was later extended to 25 distribution points. The lifespan of both of those experiments, however, was relatively short lived. Planeta liquidated its free newspaper in 2011, while Recoletos sold its stake to the Vocento group in 2007 for €132 million, which in turn transferred it to the Gestiona group in 2012. That group, after allowing the newspaper to disappear for a few months, decided to republish it as a weekly, distributed only in Madrid and neighbouring Móstoles. The only real survivor in the free periodical arena is therefore the pioneering *20 Minutos* discussed above, which is now owned by the Henneo group from

the region of Aragón.

The revenue produced by publications of this type, which generally feature low page counts and editions put out from Monday through Friday, are limited to those derived from the advertisements they include, which are primarily small ones that have little or no presence in traditional newspapers. Probably for this reason, the two international leaders mentioned above that decided to enter into the Spanish market had their origin in and focused a large part of their business on different variants of what is referred to as *per-word advertising*. The second publication discussed above, the Swedish *Metro*, still has a presence in Spain following a series of acquisitions of publications such as *MilAnuncios*, *InfoJobs*, *Segunda Mano*, and *Anuntis*, among others. As far as their expenses, the most significant costs for free newspapers, in addition to those related to production (editing, paper, printing, etc.), correspond to their distribution, whether this takes place through delivery to mailboxes or to specific points and locations – office blocks, apartment blocks, cafés, etc. Those expenses are not to any great degree related to the production of their content, which are of little relevance and rarely, if ever, of their own production. As a distribution strategy, what was given fundamental priority was access to the busiest metro and suburban train line stations, as well as transport transfer points, although opposition expressed by publishers of *paid* newspapers and newsagent owners led to the imposition of major restrictions by local government authorities, with a resulting increase in costs that forced a drastic reduction in delivery points and the consequential drop in circulation figures. That opposition expressed by *paid* newspapers is also what

caused, to cite one significant example, the municipal government of Barcelona to prohibit advertising supports (banners) on public roads, which had been planned as part of the publicity campaign for the launching of *Barcelona y M@s*, in addition to a series of obstacles mounted to the installation of locations for dropoffs and distribution.

In general, it can be said that the *free newspaper* experience in Spain ended as a relative failure. This is especially true in relation to the aspirations of groups that had taken the development of the phenomenon in the Scandinavian countries as their model, either by means of their own experiences or by attempts at emulation. The formula persists, however, now being replicated in the magazine sector, with some having been almost entirely withdrawn from distribution at newsagents and only delivered for free to a very loyal readership or via subscriptions, and with their only financial sustenance coming from their advertising revenues.

For years, another unusual *speciality* in the Spanish media market was represented by the publications known as the *popular press* or *tabloids*, a format with high circulation figures especially in English-speaking countries, as well as a in Germany where *Bild Zeitung* had managed to achieve sales and distribution figures in the millions. It was in fact the group Axel Springer, publisher of that newspaper, which joined forces with Prensa Española, publisher of the veteran conservative-monarchist *ABC* to launch the first effort to introduce that format to readers in Spain. The title selected was *Claro*, with sales forecasts of around 400,000 copies daily, and it first hit the streets on 8 April 1991. That

experiment, however, fell far from achieving its target, and it ended up first in a relatively tumultuous divorce between the partners, and then in the dissolution of the newspaper, with the last edition being published on 6 August 1991 after barely 20 weeks on the market. Although the actual figures were never released, it is worth noting that the publishing company started out with 13 billion pesetas in capital (€78 million), but it had circulation figures that, according to estimates in the lack of figures audited by the OJD, never exceeded 60,000 copies daily, and with the most reliable calculations putting losses from the experiment well above the capital that was initially contributed by Springer and Prensa Española on a 5050 basis. Both companies attributed the failure to the robust presence of celebrity gossip magazines on the Spanish market, a competing force they claimed to have underestimated. Reflections that came later, by those other than the sponsors, favoured the argument that tabloid publications had not achieved success in any Latin country, and that there was a lack of cultural and mediarelated harmony between the German group and the Spanish publisher, which was known to be one of the most traditional and least innovative in the country. The disparate profiles of the typical readers of *ABC* and *Bild* reflect the strong likelihood that opposing strategic options were favoured by the two shareholders, which ended up becoming manifest not long before the German group decided on the final shutdown. Be that as it may, the reality is that there have been no subsequent efforts to develop publications of this type.

Some who have studied the situation in depth agree that the relevant portion of the market has been occupied for a long time

by the aforementioned celebrity magazines, and it is true that the penetration of publications of that type remains relatively stable, with readership numbers that comfortably exceed those enjoyed by the rest of the print media. For years the leading position in terms of numbers of copies sold was held by *Pronto*, featuring content that is at least partly similar to that which the *tabloids* tend to include, but without going as far in terms of sensationalism. What is certain, in any event, is that weekly titles such as *Hola, Lecturas, Diez Minutos, Semana,* etc. maintain distribution and sales figures that amply exceed those of any newspaper with nationwide distribution. This is, it must be said, a phenomenon relatively characteristic of the Spanish market, which to some degree has entered into a sort of feedback loop during the last decade with the appearance of television programmes that replicate that content focused on the *famous*, both in relation to the arts and those derived from the profusion of spaces dedicated to the socalled reality shows. It is clear that, especially compared to everything else, this genre of magazines holds a much more stable and almost privileged position, which the recent economic crisis did nothing to change. Something equivalent to this, or at least similar, can also be said about other publications and magazines oriented towards very specialised segments of the public, which have a wellestablished presence in the market compared to the gradual disappearance of those dedicated to more generalised contents.

III.3. Nostalgia for the publisher

Do they still exist? Or are they all gone? As with anything else, it is risky, and maybe even unfair, to generalise. Nevertheless, there can be no doubt that many of the publishers that held important positions during and immediately after the Transition have disappeared. They have been replaced – it is worth emphasising – by managers who tend to apply to the media the same approaches found in standardised management textbooks, even though such approaches are not proving effective in the sector. This brings up the need to pose a very significant question: are media companies really just companies like any other? Or, as some would claim, do they have unique characteristics that need to be respected? The reality is that it would be foolish to deny that they have such characteristics, or to diminish their importance. However, something similar can be said about any other specialised business activity, which turns the question into one of why so many managers fail to properly take those characteristics into account, as unfathomable as it may sound.

Of course, it is also difficult to produce a securely delimited definition of what a publisher is. Does any enterprise that owns a newspaper deserve that designation? Surely not. Perhaps the most accurate answer would be to grant that distinction to any company that has publishing activities as its primary focus or *core business*. It seems important to make this distinction because there has been no lack of entrepreneurs who have entered into the world of journalism as a way to supplement

their more fundamental vocation, often with intentions and propositions that have little or nothing to do with *producing* information. In fact, rather than being few in number, there have been multitudes fitting this description, although it is important to remember that most of their efforts have had less than positive outcomes. Their ventures have confirmed that making the media source they have acquired subordinate to their own interests – whether related to business, politics, or as in many cases, simply personal pursuits – has been detected by the market, condemning them first to marginality, and then to dissolution, mostly as victims of their own lack of credibility or, to look at it from another perspective, lack of quality. All of this serves to verify that the figure of the publisher tends to be a determining factor in terms of how things will play out over time, or in terms of the trust readers are willing to place in a publication. It would not be overly audacious to state that the loss of the publisher in the pure sense, or the relinquishment of that role among the better part of the well-established, more persistent media sources, could be and probably is the origin and cause of the falling circulation figures they have experienced in recent years. To some extent, another plausible definition of that position could be related to the degree of respect a publisher's management style shows towards the work of professional journalists. And in this sense, it is worth emphasising that one clear symptom of many cases of dissolution or abandonment can be seen in the trend towards increasing interference by a media outlet's management in the tasks of writing and editing.

To some degree, the process itself has been rather striking, to the point where it becomes difficult to determine which came first:

whether the pure publisher disappeared because of some crisis, or whether that crisis resulted from the publisher's disappearance. It is, considering that the written press – the *paper* – was for years a magnificent line of business, giving rise among other effects to the construction of media empires, with the leap from newspaper ownership to a presence in radio and television. For decades, publishing in the print media was highly profitable, despite the evidence showing higher average sales and circulation figures in nearby European countries.

Despite all this, the importance of the publisher continues to be crucial, and this is why the changes that have occurred in terms of the role of the publisher are probably the key to explaining, and above all understanding, how and why the whole scenario in which the media exists has also changed. There is more than enough evidence to suggest that things are not what they once were, with concerns, if not in fact certainties, regarding the loss of independence that now colours the public's view of the media. In fact, multiple factors have come together to bring about this situation, not just those that can be attributed to technological progress, as commonly believed. A large part of the reason undeniably lies in the economic-financial deterioration of the companies, but this must not obscure two other aspects that are equally or even more essential: on one hand, the accumulation of strategic errors as described above, and on the other, the deaths of certain publishers who held leadership positions and the inability of others with a similar profile to be able to, or to know how to, replace them. What is important to recognise most of all is that their scarcity, or virtual absence, can be seen as one of the essential causes for the appreciable decline of the large

publishing groups that once dominated the media landscape.

Ultimately, this brings up the dilemma of the chicken and the egg: which came first? The question has to be asked whether the decline was caused by the economic-financial undermining of publishing companies, or whether a loss of quality eventually plunged those companies into a situation bordering on technical insolvency and increasingly problematic survival. And these precarious circumstances often led them to rely on the contribution of funds by individuals or entities pursuing spurious interests that had little or nothing to do with reporting the news. That phenomenon, in and of itself, is far from anything novel. As always, some spaces in the news media landscape have been occupied by sources founded on defending the interests of their owners, who in fact established or acquired them with that intention, often treating them as just another investment. Those scenarios do not tend to last for long and they have been easily identified, or are sufficiently identifiable, and above all they result in operation at a relative disadvantage compared to others characterised by a lack of any links to anyone in particular, although this is exactly what has been disappearing these days. In recent years, and specifically in the last decade, an ample portion of the media, including some of the most important sources, have become part of corporate groups centred on activities outside the world of news reporting, and this has been especially notable in certain cases.

It is specifically worth repeating that among the paradoxes that characterise recent developments in the print media, especially newspapers, is the clear failure to observe the basic principles of

good business management, as seen in the decisions made by those in charge. This is true in relation to at least two aspects: on one hand, failure to pay attention to the differentiating element, and on the other, ongoing increases in sales prices for a product with a level of demand that has been persistently in decline. Of course, what can and in fact does differentiate one newspaper from another is the quality of its content, which is in turn a direct result of the qualifications of those who work for it, or in other words, its editorial staff. However, instead of attempting to obtain the most qualified collection of editors and writers possible, the dominant trend in recent years has been just the opposite. These days, editorial offices are largely populated with recent graduates, if not simply interns, while at the same time staff reduction plans have proliferated, targeted at the professionals with the most seniority and therefore the most experience. To state this as clearly as possible: the production of newspapers is now in the hands of people with little experience, who are poorly paid, and with little or no expectation of job security. The result could be nothing other than a sharp decline in the quality of the content produced, with diminishing value added that in turn gives consumers little incentive to spend their money.

The matter of price is another point that deserves consideration. In the context of little or no inflation that has characterised the last decade, newspapers have nevertheless continued to increase their sales price. The result is that even in the face of a drop of around 70% in sales figures during the last 10 years, a newspaper today costs almost twice what it did a decade ago. Apart from the fact that this does not seem like a very wise policy from a

market perspective, these price hikes have also, rather suspiciously, coincided, although Spain's National Markets and Competition Commission has failed to show any great interest in investigating this, let alone penalising it.

Regardless of the activity or sector involved, a key component of effective management is knowing how to adapt to change, whatever that change may be, as a way of maintaining or, if possible, improving an enterprise's position versus its competitors. This is what any textbook on how to manage a company would say. And there have been changes everywhere. As mentioned several times earlier, the technological component tends to be the focus of most conversations about this issue, but there have also been a set of transformations taking place in society that are of no less importance, even if less frequently discussed. There is no doubt that these other societal changes are closely related to the technological ones, but it cannot be denied that in general terms, people have significantly changed in terms of their needs, habits, and behaviours, both in relation to their recreational activities, understood in the broadest sense, and to the way they access information. To draw attention to just one aspect, these days it is clear that the public's demand for immediacy in their knowledge of the *news* is far greater, and people have an almost universal ability to access the tools provided to them for this purpose. Also, seemingly in contrast to this but actually complementary, is their desire for more interpretation, contextualisation, and insight, given the profusion of news reporting at their disposal. It is therefore obvious that the practical abandonment of that last requirement by the traditional media, or their inability to address it – especially

printed newspapers – is acting as one of the factors contributing to their loss of circulation, sales, and social acceptance. This is something that would surely have almost nothing to do with what could be considered as the disruption introduced by technological progress and the degree of penetration of new technologies, in particular that brought about by the Internet. It would instead be much more attributable to the management strategy selected, far beyond what those within the sector are accustomed to admitting. This is especially true because it is far from the first time that new habits have emerged, bringing very relevant changes with them. Perhaps the best and most recent example of something like this was when television first appeared, and many believed it would represent the inevitable end of radio. Obviously that did not occur, to some degree because those managing that medium made good decisions in terms of repositioning themselves versus the new technology, taking advantage of their specific potential and aspects that were to some degree unique, or in other words, they prioritised aspects of their offering that television was unable to fully replicate. The question would therefore be whether those managing the *paper* will now know how to take maximum advantage of the strengths that differentiate their offering from the rest… and those strengths do exist. However, it may be worth quoting here the opinion expressed years ago by the head of an emerging online source: 'effectively, the *paper* could die… if those managing the companies decide to kill it, whether intentionally, by necessity, or by neglect.'

For the time being, the prevailing publishing strategy leaves much to be desired, and the most convenient excuse, the

explosion of the Internet, cannot and should not be used to cover up the errors committed during the development of that strategy. This would overlook the fact that the structure of newspapers is practically the same as it was in far distant times – during the middle of the last century – when, in the case of Spain for example, there was only one public television channel and a central government monopoly over radio news, and when obviously the emergence of online media sources could not even be imagined.

The crisis has reached everyone to some degree or another. Not even the most veteran publications have been able to avoid it, nor have those that vigorously sprang up during the Transition years. If only because of the clear leadership position it has held for decades, it is almost obligatory to start by analysing the evolution of Grupo Prisa, beginning with its iconic publication, the newspaper *El País*. Much has been written, and above all speculated, about how and why the enterprise that aspired to be the top publishing group in the Spanish language ended up at serious risk of disappearing, something that was only avoided by a divestment process affecting various lines of business and, in parallel, entry of new shareholders entirely detached from the founding spirit of the 1970s: ranging from American hedge funds and investors from the Persian Gulf to financial institutions and telecommunications firms.

That group's expansion in the 1980s was certainly spectacular. Based on the success of *El País*, both editorial and economic, it first expanded its activities into the world of radio, acquiring a majority stake in the *SER* network, which was the undisputed

leader in Spanish radio both in terms of general programming and format radio, with the musical *40 Principales* (Top 40). The shift in control that occurred, pushing aside the traditional families (Fontán and Garrigues), was by no means free from controversy, especially when the government, led at the time by Felipe González, decided to sell the 25% stake it held by virtue of legislation from Franco's era, without first announcing any competitive bidding. Years later, while also promoting its new format radio offerings, the *SER* network consolidated its position by forming an association with *Antena 3 Radio* (Grupo Godó), with the subsequent disappearance of that brand and the integration of its broadcasting into the group's various networks. Grupo Prisa's radio division also began to acquire shareholding stakes in Latin America and established agreements with the Mexican network *Televisa*, which was focused on the Spanish-speaking market in the USA.

Another area of new penetration for that group was the economic press, with the acquisition of *Estructura*, publisher of the longstanding *Cinco Días,* and from the French publisher Servan-Schreiber, the magazine *Mercado* in 1989. It also entered into the sports media with the acquisition of the Madrid newspaper *As*. And, it tried its luck in the area of general news magazines with the launch of the weekly *El Globo* in October of 1987, although the poor market penetration of that publication forced its dissolution just 11 months later.

In any event, many of the analyses of group's problems pinpoint their underlying source as its entry into the world of television. Strictly speaking, what put Grupo Prisa on the verge of

catastrophe was a level of debt that was probably unsustainable under normal conditions, but still more difficult to manage in a scenario of plunging revenues and reduced profit margins, above all in its publishing business and including those derived from *El País*. Although it is clear that poor business decisions made the incursion into television less than successful during several phases, there has been less emphasis placed on one decision that ended up being its worst and more serious strategic error: its investment in the takeover of the Media Capital group in Portugal. It is important to take that move into account, not only because it caused the group's debt to rise up to a level far beyond what was manageable, but also because the price paid was immediately revealed as excessive and difficult to recover, even if the revenue figures and profitability existing prior to the acquisition had been maintained. In any event, in order to better understand its evolution, it will be worth the effort here to present a more extensive review of Grupo Prisa's policy on expansion and diversification.

The Portuguese group Media Capital, owner of magazines, radio stations, and television production firms and networks, was acquired in 2007 for about €800 million. That incursion into Portugal became more complicated, however, when authorities from that country, based on its national legislation on securities markets, required Grupo Prisa to issue a mandatory takeover bid for 100% of the Portuguese group's shares. This exceeded the initial intention, both in terms of number of shares and especially the price, as it had been previously agreed that the acquisition would be limited to a 77% controlling interest, with the inclusion of the typical premium over the quoted share price. In private,

some of Grupo Prisa's own shareholders expressed their misgivings about the increased liability the transaction would entail, as well as other sudden changes to the plan. What is certain is that failure was in the cards from the very beginning: Grupo Prisa's entry in the Portuguese market not only failed to improve the deteriorating position of the newly acquired group's main companies in the market, it failed to even slow that trend. The venture might have ended with the group being repurchased by its previous shareholders, at prices significantly below what had been paid earlier, or with a subsequent agreement to sell to the French-Dutch group Altice, but the first group withdrew and the second option was disallowed by the Portuguese competition authorities, because they believed it would cause excessive levels of concentration in certain sectors of activity. Sometime later – in the summer of 2019 – Grupo Prisa closed a new deal to offload its shareholding in Portugal, this time with the Portuguese corporate group Cofina for an amount of €170 million, with valuation of the group as a whole at €255 million, far below the €440 million agreed earlier with Altice, and even further below the amount initially paid for its acquisition. In any event, that transaction would also have to be accepted by the regulatory authority.

In Spain, Grupo Prisa first entered into the world of television during the earliest phase of privatisation of that *service*, through an alliance with France's *Canal Plus*. At the beginning, there was a focus on the paid modality, with only a tiny portion of its programming broadcast as open access and with its acquisition of subscribers based on its sports and cinema offerings, including the country's first channel to broadcast pornographic films.

For Grupo Prisa, and more specifically for the evolution of its incursion into television, the 1996 electoral victory that brought the People's Party (PP) into power was critical. That election also saw José María Aznar, a conservative politician representing that party, who had already come close to victory in the previous elections held three years earlier in 1993, elected as Spain's Prime Minister. To the PP's strategists and especially its party leaders, it seemed as though the series of corruption scandals affecting various members of the existing socialist administration, along with excessive spending during that party's long decade in power, would be sufficient in that earlier election to lead to the successful unseating of Felipe González from his position as Prime Minister. However, to everyone's surprise, especially those leaders, the Socialist party achieved a comeback in the polls and ended up with a victory that, although not achieving an absolute majority, allowed it to maintain control of the government for three more years. This was done essentially with the reciprocal support of the Convegiencia i Unió party, which also lacked a sufficient majority in Catalonia's parliament, forcing that party to rely on support from the PP to allow Jordi Pujol to retain his leadership of that region's government (the Generalitat de Catalunya).

It is worth pointing out that the declining popularity of the socialists and signs of a growing perception of the need for a change in leadership in the central government, which is a somewhat euphemistic way of referring to support for replacement by the conservative party, had used a portion of the media as its spearpoint. Perhaps for that reason, Aznar did not hide his conviction that the media played a role in preventing his

victory in that first election, and he very specifically blamed Grupo Prisa, both in the form of *El País* and, especially, *Cadena SER*. And this is more than likely the reason why, when the Popular Party ended up winning the subsequent election, those within that party believed the time had come to fully shut down the privileges that, in their view, González and his supporters had been granting to the group headed by Jesús de Polanco and Juan Luis Cebrián: Grupo Prisa. One way to do this, they thought, was to support the establishment of an alternative media group, which as a minimum would replicate the sort of support that Grupo Prisa had supposedly been giving to the socialist PSOE party, with this new group providing political backing to the conservative party.

They decided to act on two fronts at once: on one hand, by creating an empire around Telefónica, which was still the public telecommunications monopoly at that time, and to which Aznar had appointed one of his school friends from El Colegio de El Pilar, Juan Villalonga, as chairman of the board; and on the other hand, by intervening in one of Grupo Prisa's most cherished projects, which centred around taking control over the broadcasting rights for football, which it was doing in the form of its new paid platform *Canal Satélite Digital* (CSD). This would ultimately trigger a conflict that would end up before Spain's National Court, and spur an advertising boycott by the telecommunications operator, which was one of the country's main advertisers, against all of Grupo Prisa's media outlets. The reasoning behind the legal action pursued against Sogecable, Grupo Prisa's commercial television company, was based on allegations of the misappropriation of funds that subscribers to

Canal Plus were required to put up as a deposit for their decoding devices, with the pertinent claim being lodged by a *private individual*. The ins and outs of that case, played out before the administrative courts, were drawn out and tortuous, but they ended up with dismissal of the matter and a complex, unsteady ceasefire. One of the milestones in that war was the configuration of a platform as an alternative to CSD under the name *Vía Digital* (VD), with the majority of shares held by Telefónica and the Mexican audiovisual group Televisa. As might be imagined, the two channels continued to engage in a vicious battle, both to obtain broadcasting rights for the top Spanish football league and the main European competitions and to attract and acquire customers. Among other factors, they chose different, incompatible broadcasting satellites, making it impossible for subscribers to change from one platform to the other: CSD maintained its agreements with Astra, while VD chose the semipublic Hispasat, whose shareholders included Telefónica itself. It is worth briefly mentioning the role, in some cases an enormously distortionary one, played during those processes by established publishers such as Antonio Asensio, financiers such as Mario Conde, and emerging players such as Jaume Roures, adding to a series of overtly politicised movements promoted from within the Aznar government. And, to a certain degree, the idea of starting up a media group that would serve as an alternative to Grupo Prisa would also seem a tempting proposition to the next government led by the socialist Rodríguez Zapatero.

Without going into further detail about that conflict, what is certain is that it all became curiously well sorted out once the second legislature with the People's Party at the helm came to

pass, which this time had a solid absolute majority. Nobody can really be sure of the degree to which the calm was brought about by the replacement of Juan Villalonga as chairman of Telefónica by César Alierta, who immediately ordered the liquidation of Telefónica's shareholding in all media outlets. The intention of establishing a group ideologically *opposed* to Grupo Prisa thereby dissipated, and conversations began on the subject of merging the two digital satellite platforms, which would culminate with a takeover of Vía Digital by Sogecable. However, in no way did this bring an end to the socalled *football war*, that is, the struggle to acquire the television broadcasting rights for the top competitions: the topflight Spanish league (La Liga), the European Champions League, the English Premier League, and the Euro Cup and World Cup tournaments. Shareholding in that platform never became stable, however, and it would eventually end up in the hands of Telefónica in 2015, following some further ups and downs that will be discussed further below.

One relevant milestone that ended up being pivotal was Grupo Prisa's decision to exclude its subsidiary Sogecable from the stock market listing initiated years earlier. Following the subsequent delisting tender offer, at the last minute Telefónica, which owned 16.7% of the company resulting from the aforementioned merger with Vía Digital, decided to take part in the public offer and, consequently, forced Prisa to acquire its stake. This represented an unexpected outlay for that group, which was already immersed in financial difficulties but which nevertheless had to increase its debt levels even further. Then, years later, specifically because of its inability to manage the debt it had taken on, Grupo Prisa was forced to agree to an extensive

divestment plan that, in the end, included the transfer of Sogecable to Telefónica, which acquired it in 2015 for a price of about €700 million.

It is therefore clear that Grupo Prisa's incursion into television did not yield the expected successes, and it turned out to be the weakest link in the ambitious expansion programme that had been initiated with its entry into trading on the stock exchange in the year 2000. It is also important to point out that its track record as a listed company left much to be desired, with a very appreciable decline in its capitalisation level. It shares were initially traded at a price of around €20 per share, quickly increasing to above €32 but then experiencing a serious freefall until ending up at less than €1 per share.[17] The group's entry into open-access television did not fare any better. As described above, the government led by Rodríguez Zapatero authorised the migration to open-access broadcasting for the licence that had been granted earlier during the first round of tenders following liberalisation. As such, the paid programming produced by the original *Canal Plus* was transformed into an open-access signal under the name *Cuatro*, but the very low viewership share it managed to gain, around 67%, ultimately forced its sale to the Mediaset group (*Tele 5*), which had never really successfully regained its own degree of market penetration in terms of viewership either. Another one of its efforts to find a niche in the television market met a similar ill fortune: its association with the American Turner group, which owned, among other channels, the CNN news network. This took place in an effort to implement

17 Trading at €1.27 per share in October of 2019.

a replica in the Spanish language under the name *CNN+*, with 24hour programming dedicated exclusively to current news and reporting. The disappointing degree of success this experiment achieved, despite the significant allocation of media resources and professionals, caused Turner to withdraw once the initial agreement had expired, and after a brief period of solo operation, Grupo Prisa decided to terminate the channel, transferring the associated licence and frequency to Mediaset in 2010.

Relatively in parallel, and representing a final chapter in all this, Grupo Prisa's shareholders had changed, especially following the death of Jesús Polanco[18]. This included the introduction of several hedge funds, with the main one being Amber Capital (19.2%), and with a debt-to-equity conversion of some of the group's liabilities into shares, in particular the debts owed to Banco Santander, La Caixa, UBS, and Telefónica. Another significant aspect is that the Polanco family's shareholding stake was gradually reduced, from 71% in 2009 to the current 17.5%, with no significant presence on the directorship bodies. The final step in the process, at least for now, was Juan Luis Cebrián's *retirement* from all of his duties as an executive, remaining only as the honorary founder of the *El País* newspaper.

Less successful was the journey of the second editorial group that emerged under the umbrella of the Transition: it disappeared. This is what happened to Grupo 16, with only one of its original titles surviving today, although under a different format and

18 Jesús Polanco died from cancer in July of 2007, at the age of 77.

ownership. Unlike Grupo Prisa, Grupo 16 emerged without a financial-business structure that was sufficient to allow it to become wellestablished in the market. In fact, this would continue to be its main weakness throughout its almost 30 years of existence, and it was probably the most direct cause of its final dissolution. The group was first established in 1971 at the initiative of Juan Tomás de Salas and 15 other partners, who started with the weekly *Cambio 16*, with the first edition appearing on 22 November of that year. Initially conceived as a publication primarily economic in nature, that magazine soon entered into the territory of political news reporting, with content and editorial collaborations that were somewhat transgressive in relation to the general tone being expressed by other media sources. That led to a variety of administrative penalties and warnings, including confiscation of a few weekly editions. With its clear stance in defence of the recovery of essential freedoms even before the actual death of Franco himself, the publication was undoubtedly one of the precursors to the democratic evolution that followed the end of the Francoist regime.

The success of *Cambio 16*, in terms of sales and circulation as well as reputation, gave rise to the progressive configuration of a corporate group, with the most notable milestone being the launch of *Diario 16*, initially released as an evening newspaper, but which soon shifted to morning publication with clear aspirations to compete against the recently established *El País*. The publication was conceived based on a liberal viewpoint, somewhat more centric than the paper published by Grupo Prisa, with a tone closer to the *popular* press but without crossing into

the territory of sensationalism. It was also a pioneer in ignoring the limitation imposed by the *Hojas del Lunes*, regional newspapers with exclusive authorisation to publish on Mondays, when in 1980 it decided to publish editions seven days a week, to some degree spurring other newspapers to also have a Monday presence on the newsstands. In parallel, the group decided to get involved with other areas of publishing, incorporating titles such as *Motor 16*, bringing back the weekly *España Económica* years after it had been shut down by the Franco regime, and also including the Spanish edition of *Marie Claire*, *Historia 16*, and even a few collections of books under its imprint, one of them associated with the Plaza & Janés group. Later, beginning in the mid1980s, it began an expansion into regional markets with specific editions of *Diario 16* appearing in Andalusia (Seville and Málaga), Aragón (Zaragoza), Galicia (Vigo), the Valencian Community (Valencia), the Balearic Islands (Palma de Mallorca), and Murcia, with most of these being published in collaboration with local partners. During those same years it also decided to try its luck with the thenemerging market for economic news by launching *Economía 16*, but coexistence with three other similarly specialised titles in Madrid eventually led to its demise just a few months later.

The financial weakness of the group, reluctant to add outside shareholders to the 16 initial founders, created more than a few difficulties for development of its subsequent expansion plans. The strategy eventually included an agreement to allow only the holding of minority interests by shareholders such as the National Organisation for the Blind (ONCE) and Grupo Construcciones y Contratas (CyC), with those shareholders failing to make

sufficient contributions to provide even a minimum degree of solidity. On the other hand, the death of one of the founding partners and the willingness of that founder's heirs to sell their stake led a takeover attempt by the French publisher Hersant, which ended up being frustrated by the administrative limitations in force at the time restricting foreign shareholding in companies holding an audiovisual licence, because Grupo 16 had been authorised to broadcast the FM station *Radio 16* in Madrid.

The group's delicate financial situation, along with a series of disagreements between Juan Tomás de Salas and the professional staff, ended up creating a situation of near insolvency that the successive entrance of new shareholders did not manage to resolve. During a first stage, the creditor banks forced a management change, installing executives they trusted, but this did not result in sufficient improvement to overcome the existing difficulties, so efforts were renewed by bringing in José Luis Domínguez as a shareholder, a successful businessman who had started up and later sold the computer company Amstrad. This also involved departure of the group's founder,[19] but the new ownership could not find a way to manage the existing debt payments, and following the liquidation or shutdown of other publications, the newspaper *La Voz de Galicia* took over *Diario 16* in 1998. During the next few years a variety of plans were conjured up to allow for a relaunching, until at the end of 2001, following another attempt to add new shareholders and relaunch the newspaper, it finally succumbed. In the end, the story of

19 Juan Tomás de Salas left the group in 1997, when insolvency proceedings began for *Diario 16*. One year later he launched the satirical weekly *El Gato Encerrado*, but it failed because of a lack of financing. He died of cancer in the year 2000 at the age of 62.

Grupo 16 and its eventual demise confirms the inescapable nature of the difficulties confronted by any business project that lacks a sufficient capital base.

The story of the third group that arose during the Transition, Grupo Zeta, contains some similarities but also unique differences. Its first similarity to Grupo 16 was undoubtedly the predominant role of its initial promoter, in this case Antonio Asensio, a figure as singular as Juan Tomás de Salas, or perhaps even more so. Although there were significant differences between their respective personalities, they did share some essential characteristics in terms of their management styles, with another difference being that Grupo Zeta has managed to survive, although just barely and, in the end, with a change in ownership.

Grupo Zeta was also established based on its founder's personal project, which revolved around a magazine that gained notable success in the market soon after its appearance. In this case, the undeniable point of origin was *Interviú*, a fairly ground-breaking publication that appeared on 22 May 1976, combining sensationalist news reporting with female nudes, in the style of the risqué *men's magazines* like the legendary *Playboy*. The group focused its first phase of expansion on that line of publications, with a variety of titles that attempted to take advantage of decreasing censorship and the desires of a segment of the public that up until then had no opportunity to consume publications from that genre, except when taking advantage of trips to foreign countries or through clandestine deliveries from them. Very soon it became apparent that Antonio Asensio's true ambition was to

promote titles and media sources in the area of what is rightly or wrongly referred to as the *influential press*. This goal was accomplished in the form of the magazine *Tiempo*, with the first issue published on 17 May 1982 in direct competition with *Cambio 16*, along with the newspaper *El Periódico*, which was published at first with simultaneous but different editions in Barcelona and Madrid, relying on a format similar to that of the British tabloids, although with more serious content and similarities to the *USA Today* newspaper in that country. This experiment, however, did not find success in Madrid and was soon reduced to just *El Periódico de Catalunya*, which continues to exist today as the direct competitor to *La Vanguardia*, which has been around for more than a century. Years later, Grupo Zeta decided to join the trend being followed by other national dailies by introducing various forms of decentralisation. It emulated the approach innovated by *El País* and *Diario 16*, adding regional titles in Zaragoza, Asturias, and Extremadura. It also decided to enter into the field of economic reporting with the magazine *Dinero* and subsequently with development of the newspaper *Gaceta de los Negocios*, which years later would end up in the hands of Grupo Intereconomía,[20] and converted into a general-content newspaper before enduring a prolonged decline that would leave it with an only residual presence as an exclusively online publication.

20 Grupo Intereconomía was founded in 1994, initially as a radio broadcaster. Three years later, after being acquired by Julio Ariza, who was from the region of Navarre and an ex-member of Catalonia's regional parliament representing the PP party, the group expanded into television with an increasing far-right political slant. After several episodes of insolvency, which were resolved in a nontransparent manner, it still survives today, but in a fairly precarious state of existence and limited to the field of television.

At the same time as it was strengthening its presence in the print media by launching the specialised newspaper *Sport*, which was especially dedicated to football and the teams from Barcelona, Grupo Zeta continued to expand its catalogue of magazines with titles such as *Panorama*, the travel-focused *Viajar*, and an ephemeral effort to gain a share of the celebrity gossip segment by launching *La Revista* with the intention of competing directly against *Hola*, although it was shut down not much later after accumulating substantial losses. The group also decided to take on a presence in the publishing world by acquiring the catalogue of Bruguera and launching Ediciones B, which in the end would be sold to Random House in 2017, and it also acquired the news agency OTR Press, although that would not wind up being a successful experience either.

The most relevant milestone, and probably the one that paved the way to his later problems, was Antonio Asensio's effort to take control of a television station. The group had already acquired a presence in the audiovisual world through film production, but it also decided to compete for one of the television concessions granted by the government during the first tendering process in 1989. However, as mentioned, it did not manage to obtain one of the three available. This did not prevent further efforts though, and years later in 1992 it managed to acquire a shareholding stake in *Antena 3 TV* along with Rupert Murdoch and the bank Banesto, but its position in control of that network's management lasted for only about five years before it was eventually replaced by the publishing group Planeta.

What also played a crucial role was Asensio's sudden illness and untimely death.[21] Once ownership and management had been passed on to his children, it soon became apparent that there were financial difficulties derived from the excessive debt the group had been accumulating combined with a decreasing ability to manage that debt, at a time when the circulation figures for its main magazines had begun to decline. The subsequent chain of events took place much like that seen in other such cases: the addition of new managers imposed by creditors, the disposal of assets and shutdown of publications that showed little or no profitability, etc., until the demise of even its iconic first title, *Interviú*, for which publication ended on 29 January 2018. The final episode, as tends to be typical, was represented by the group being put up for sale, and after several years of negotiations and unsuccessful efforts involving a variety of corporate groups and investors, it ended up in a rather unsubdued battle between Jaume Roures (Mediapro) and Javier Mill (Prensa Ibérica). This played out to the favour of the latter candidate, largely based on the criteria imposed by the creditor banks, since the acquirer would be taking on the majority of Grupo Zeta's debts.

In addition to publishers with a nationwide scope, the presence of others must also be mentioned, which although more or less restricted in terms of their territorial coverage, have maintained a very active presence in their respective markets. Although some more than others, they have demonstrated a desire to expand their coverage, making efforts at nationwide publication while

21 Antonio Asensio died in April of 2001 after a long illness, at 53 years of age.

larger, more wellestablished groups were making incursions into their own territories. There was even more than one effort to combine some of these publishers into projects of a larger scale, conceived or attempted by newcomers in the sector. Perhaps the most notable of these was led by Mario Conde, who from his position at the head of the bank Banesto and in keeping with his neverhidden political ambitions, took control of Catalonia's Grupo Godó.

Javier Godó, a third-generation member of the originally industrial dynasty that founded the *La Vanguardia* newspaper, decided in his day to get involved with more substantial projects, above all in the audiovisual sector. He began with control of a network of FM radio stations, *Antena 3 Radio*, which had coverage over almost all of Spain's national territory. These stations were managed by a group of professionals with a high capacity for innovation, headed by a journalist with a long career history, Manuel Martín Ferrand. Based on the network's success in radio, a decision was made to compete for one of the new private television licences, and a licence was awarded. Soon television broadcasting began under the same name, *Antena 3*, with Martín Ferrand himself responsible for directing the venture. However, whether because of the magnitude of the financial effort required, or because of the shareholding restrictions imposed in the tender specifications – maximum ownership of 25% – Grupo Godó brought in a variety of other business leaders and, in the end, lost corporate stability due to initial broadcasting operations that entailed higher costs and insufficient revenues to immediately establish minimum levels of profitability. It was

within that context that Mario Conde[22] appeared, willing to acquire shares in *Antena 3* with substantial capital gains for its existing shareholders. In reality, however, the banker who had suddenly emerged on the scene had his eyes set on Grupo Godó as a whole, especially *La Vanguardia*, which is why he made a substantial offer to obtain a shareholding stake that, among other effects, would allow Javier Godó to catch his breath in view of the excessive financial commitments he had taken on with his incursion into television. It is surely for that reason that he decided to sign a preliminary agreement to define the transaction. But as tends to occur in such cases, it never became clear how or from where the louder, more decisive alarm bells went off, or what ultimately gave rise to the subsequent decision to call off the deal, but what is certain is that things turned out very differently from what was implied by the initial agreement between Conde and Godó.

The owner of *La Vanguardia*, who had primarily been alerted by his closest associates, was persuaded that the ultimate aim of the chairman of Banesto was not the simple help and collaboration proposed, but rather the takeover of the family-based publishing group. At the same time, plans for two alternative transactions arose from a variety of sources, including some of the leaders of the newspaper itself, which would ultimately come to fruition. First of all, Grupo Prisa offered to combine its respective shareholding interests in the SER conglomerate and the *Antena 3 Radio* broadcasters into a single holding company, Unión Radio, in which Grupo Godó would hold a significant stake. Secondly, the

22 Mario Conde, a former state's attorney, was sentenced to more than 10 years in prison for crimes committed while chairman of the bank Banesto.

bank La Caixa approved a loan that, with the pledge of a portion of shares in *La Vanguardia* as collateral, would allow Godó to meet his financial commitments, including those taken on with Banesto-Conde over the course of the initial negotiations. Did the government intervene to cause the final breakdown of the deal with Mario Conde and the subsequent collapse of his mediarelated aspirations? The standard practice in such procedures would suggest that this question will never be answered. Years later, the Unión Radio transaction would lead to disagreements between Godó and Grupo Prisa, but at the same time it would yield substantial dividends for both parties and its only victim would be the *Antena 3 Radio* stations, which would disappear as those frequencies were subsumed into the various SER networks. The financing from La Caixa, on the other hand, would be covered by profits from the newspaper, with the pledged collateral eventually released. In the end, none of this would result in Grupo Godó becoming entirely absent from the world of audiovisual media. Years later it would incorporate the *RAC1* radio network, which still today boasts the highest number of listeners in Catalonia, along with the Barcelona television network *8TV*, both broadcasting in Catalan, although with the latter demonstrating less favourable results.

It should also be noted that some groups and titles have maintained their territorial positions throughout recent decades, or even expanded them, both geographically and in terms of forays into new activities, including the audiovisual sector. This has been the case with Grupo Correo, which from its origins in the Basque Country with the newspaper *El Correo Español* in the province of Biscay, expanded its presence by purchasing regional

periodicals from the long-existing Editorial Católica publishing company, before forming an association with Prensa Española owned by the Luca de Tena family, thereby forming Grupo Vocento, and also holding a presence in television via Mediaset television and the Colpisa news agency. Another notable history can be seen in the veteran newspaper *Heraldo de Aragón*, which gave rise to what is now Grupo Henneo. Recent acquisitions by that group include the free newspaper *20 Minutos*, along with several other provincial titles, along with stakes in radio and television broadcasters. Finally, a few others that can be mentioned as having successfully consolidated their original positions include Grupo Joly from Andalusia (*Diario de Cádiz*), Grupo Voz belonging to the Rey family (*La Voz de Galicia*), the group revolving around the *Diario de Burgos*, and other titles such as *El Norte de Castilla* in Valladolid.

Special mention should be made of the conglomerate created by Javier Moll from Aragon. Although Moll had his origins as a professional and businessman in other fields, above all in banking, his first sortie into the publishing world took place in the Canary Islands, specifically the island of Gran Canaria, where he acquired two newspapers from a predominant landowner there. The first was *La Provincia*, published in the evening, and the other was the morning paper *Diario de las Palmas*. Later, in parallel with his expansion into other lines of business in places as far away as Australia, he continued to acquire publications, some by means of the auctions held for the liquidation of the central government's Cadena del Movimiento group, notably including the veteran newspaper *Faro de Vigo* in Galicia as well as *Nueva España* in Asturias, *Levante* in Valencia, *Información* in

Alicante, and *Diario de Mallorca* and *Diario de Ibiza* in the Balearic Islands. He also acquired a variety of local publications in the Barcelona metropolitan area, finally culminating with the acquisition of Grupo Zeta as mentioned above, along with the establishment of a presence in the world of audiovisual media.

Another emerging enterprise worth highlighting is Unidad Editorial (abbreviated as Unedisa), which was established with the appearance of the newspaper *El Mundo*, launched by a group of professionals who broke away from Grupo 16. Based on the initial success of that newspaper, the shareholding interests of which have never been entirely transparent beyond those in the hands of the founding professional team, the company expanded its presence into the world of audiovisual media, although with little success, when it purchased Grupo Recoletos, the publisher of, among other titles, the economic newspaper *Expansión*, the magazines *Telva* and *Actualidad Económica*, and the sports newspaper *Marca*. The cost of that growth, together with a decrease in circulation experienced by its main asset, led to a takeover of control by one of the partners, the Italian firm Rizzoli, then to the progressive defection of a good portion of its Spanish partners, beginning with most of its professional team. *El Mundo* also took part in the trend towards decentralisation, launching specific regional editions in the Balearic Islands, Castile and León, the Basque Country, and Andalusia, although it ended up adopting the same decision made by its competitors to recentralise. Finally, demonstrating a clear intention to produce a nationwide newspaper, the publication of *La Razón* began in Madrid in 1998. This took place at the personal initiative of Luis María Anson not long after he was removed from the directorship

of the monarchist paper *ABC*, with a very significant shareholding stake held by the Planeta publishing group. Soon, tensions between the two would lead to Planeta taking full control of the newspaper, which from its origins had positioned itself in a centre-right political position close to that of the People's Party (PP).

It is also worth mentioning, as an aside, the unusual publishing strategy pursued by the Lara family and its Planeta group derived from its series of incursions into the media world. These go far back in time, some with little success, including a fleeting political weekly as well as the *Quiero TV* audiovisual platform, which ended up incurring enormous losses, and the free newspaper *ADN*, which also disappeared rather quickly. However, the fates of its more recent ventures have been different, also with the peculiar characteristic of combining ideological slants that are clearly contradictory: the newspaper *La Razón* (conservative right), *Antena 3TV* (centrist), *La Sexta* (social democratic left), and *Onda Cero Radio* (centre-right). All of this exists as a sort of *jigsaw puzzle* where the respective management teams have relatively high levels of independence from the group's main leadership.

In addition to all this, or perhaps despite it, other aspiring publishers were emerging all over Spain. Many of them were doing so because of the liquidation of the newspapers published by the central government's Cadena del Movimiento, and most were coming from the business sector in the territories where one of those media sources had been established. Not all of them were spared from the political parties' attempts to lure them in,

but it was somewhat surprising that well established publishing groups showed so little interest in the auction organised by the Ministry of Finance's General Directorate of State Patrimony, which was responsible for the sale or liquidation of the assets owned by the now extinct Movimiento Nacional. All of this substantially changed the media landscape at the provincial level, with the emergence of new players that, as time went on, would diversify, or would at least attempt to diversify, their presence through incursions into the audiovisual sector. They did this by taking advantage of the power that had been recovered over local/provincial news reporting, which is more complementary to than competitive with state-run media.

Over the last 40 years there has also been no lack of failed publishing experiments with narrower scopes. One of these that seemed most promising, as well as most ambitious, was ultimately short-lived. It was launched by a lawyer from Catalonia, Sebastián Auger, who started up Grupo Mundo, a conglomerate that came to control newspapers in Barcelona and Madrid. Auger had started out in the public sector, where he worked for the taxation agency in the municipality of Barcelona on a team led by the Francoist mayor José María de Porcioles, like him with links to Opus Dei. After that, taking advantage of the power conferred by the wealth of his wife's family, he established a real estate business before entering into the publishing world with the weekly publication *Mundo*, to which he quickly added the daily newspaper *Mundo Diario* and the evening paper *Tele/eXprés* acquired from Grupo Godó. Next he gained control of the publishing firm Dopesa, and finally the Madrid evening newspaper *Informaciones*, which was experiencing

irresolvable difficulties that the new owner would ultimately fail to overcome. After a variety of ups and downs, the group ended up collapsing, becoming immersed in a variety of legal proceedings that led to a decision by Auger to flee Spain. After apparently taking refuge in Brazil, he returned to Barcelona in 1986, where he worked as a lawyer until his death a few years later.[23]

The evolution of the market, along with a variety of other circumstances, produced a situation of financial crisis for numerous newspapers, and in many cases their final disappearance. This included all of the evening publications, but also morning papers that had existed for years with respectable circulation figures. It affected both veteran publications such as *Madrid, Correo Catalán, Diario de Barcelona,* and *Ya*, as well as projects seeking a market niche they never managed to find, such as *Nuevo Diario, Tele/eXprés, El Imparcial, El Observador, and El Sol*, and it is worth the effort to add a few comments regarding some of these.

Madrid emerged as an evening newspaper in 1939, soon after the end of Spain's Civil War. During its early years it maintained an editorial position unequivocally in support of the victorious Franco regime, although later its posture shifted until it became one of the pioneers in criticising the Movimiento, to the point where it ended up being shut down in 1971, after being an administrative case that forced the suspension of publication. Its initial sponsor was the journalist Juan Pujol, a member of

23 Sebastián Auger died at the age of 64 in Barcelona on 1 April 2002, after suffering a stroke.

parliament from the rightwing Catholic CEDA party during the Second Spanish Republic. Pujol originally worked during those years for another evening paper, *Informaciones*, where he had been appointed as director by its owner at the time, Juan March from the island of Mallorca. At the beginning of the 1960s, *Madrid* was acquired by the organisation Fomento de Actividades Culturales, Económicas y Sociales (known as FACES), which was being run by several staunch supporters of Franco, but which soon became controlled by Rafael Calvo Serer, a prominent member of Opus Dei and a firm advocate of the return of the monarchy in the hands of Juan de Borbón, who oversaw an increasingly critical line of editorial opinion and news reporting. Although it did not manage to remain on the market during the Transition stage, its relevance was based on the fact that its editorial office produced the majority of the professionals who would become clear protagonists during the first years following Franco's death. Its closure at the hands of the government, on 25 November 1971, was followed a couple of years later by the rather symbolic demolition of the building it had occupied.

Another evening newspaper that met a fairly abrupt end after having a significant presence in the market was *Informaciones*, although in this case the paper maintained an active presence during the first years of the Transition. It was also an important source of many notable professionals from that period, and perhaps for that reason it has been considered as one of the precursors to the recovery of freedoms in Spain. Its most remarkable phase took place beginning with acquisition of the newspaper by a group of bankers led by Emilio Botín (Banco Santander), when it took on an agile, somewhat innovative

editorial line that led to circulation figures of around 75,000 copies each day, representing a sort of reference point for some from the more openminded segments of the Franco regime and the incipient moderate opposition. Part of its decline was derived from the loss of some of its most outstanding professionals to the new *El País* project, but it was also due to the drop in sales that affected all of the evening papers. This led to a deep crisis at the end of the 1970s, when it was acquired by Sebastián Auger, but after a variety of somewhat erratic efforts to revive its position in the market, it ended up being unable to manage its debts and the publication was finally dissolved in 1983.

The evening paper *Pueblo* suffered a similar fate, although with a different series of ups and downs. It was published by the industrial unions beginning in 1940, and it soon began to take on a clear leadership position in its segment, with a news reporting style very close to that of the *popular* press. With the initiation of the Transition and disappearance of official unionism, it became part of the central government's media group (Medios de Comunicación del Estado). At the same time, readership for evening newspapers was falling off, and it began to incur losses. Finally, in May of 1984, Spain's first socialist government decided to shut it down permanently.

Other similar publications fared no better, such as *El Noticiero Universal*. Founded in Barcelona in 1888, it would go on to become one of that city's most influential newspapers; however, its success began to waver in the early 1980s with the loss of readers that was affecting all evening papers. Following a period of serious financial difficulties, it was acquired by the

businessman Carlos José Leo – with rumours of financial support from Javier de la Rosa[24] – who oversaw a cost-cutting campaign and an effort to relaunch the paper as a morning publication. The attempt proved to be unsuccessful and *El Noticiero Universal* would end up disappearing in 1985.

The same story can be told about another Barcelona newspaper, *Tele/eXprés*, which appeared in 1964 as an evening publication, with the distinction of being the first new daily newspaper published in that city after the Civil War. Its first owner was the banker Jaume Castell, with several well-known journalists also acting as shareholders along with the Grupo Godó publishing group, which years later would take over full control of the paper. It was scarcely able to gain any penetration in the market, however, though this was in apparent contrast to a certain degree of success it garnered in terms of innovation and journalistic rigour. This led to its sale to Sebastián Auger's Grupo Mundo in 1977, although its new owners did not succeed in resolving its difficulties and ended up dissolving it in 1980. To a great extent, that newspaper was the starting point for many of the most noteworthy journalists who emerged from Catalonia in the years following the Transition and during the return to democracy.

Several long-standing morning newspapers also became defunct, such as the one considered to be the doyen of the daily press, *Diario de Barcelona*, which first went on sale in 1792. After more than a few ups and downs, including confiscation at the beginning of the Civil War, the business was returned to its owners and it

24 Javier de la Rosa was sentenced to a prison term for a variety of financial and corporate crimes.

became one of the newspapers with the highest sales figures and readership in that city. The end of Franco's regime, however, plunged it into a profound crisis, with its sales dropping to only 7,000 daily copies, and in 1980 it could no longer manage its debt, with publication ceasing soon thereafter. However, at the end of that same year its employees managed to bring it back under a self-management model, in a bilingual Spanish-Catalan edition. Nevertheless, it would disappear from the newsstands again in 1984. One year later, Barcelona's socialist municipal government, led by Pasqual Maragall, took over ownership of the paper, ceding its operations to Grupo Zeta, which decided to reopen it in 1986, publishing solely in Catalan. Far from financially stable, and at the *suggestion* of Barcelona's municipal council, ownership was handed over to the National Organisation for the Blind (ONCE)[25], but its consistently declining sales figures, along with other tumultuous events, ultimately led to the transfer of its shares to the publisher Dalmau (*La Mañana* newspaper in the city of Lleida), which rebaptised it as *Nou Diari*. Although its *print* edition was finally shut down in 1994, the newspaper survived under ownership by Barcelona's municipal council, which kept a digital version active until its final shutdown and disappearance in 2009. For the newspaper commonly referred to as *Brusi*, that was how the story ended after more than two centuries of history.

Although not as long as that of *Diario de Barcelona*, the newspaper *El Correo Catalán* also had an extensive history. It was initially founded at the end of 1876 by a journalist and a priest,

25 Extensive details of the ONCE's media experience can be found in Miguel Durán and Esther Jaén. *Lo que hay que ver.* Península, 2019.

who gave it a Catholic-Carlist orientation for most of its existence. During Franco's regime, that newspaper shifted to a position of moderate Catalanism, with democratic aspirations, which strengthened its acceptance among members of the bourgeoisie to the point at which it became a leader in the opposition to Franco and, in terms of its circulation figures, began to approach those of *La Vanguardia*, which was the leading morning newspaper in the Barcelona market at the time. Then, in 1974, not long before the beginning of the Transition, *El Correo Catalán* was acquired by Jordi Pujol, who changed the name of the publishing company to Fomento de la Prensa, which would later launch the Catalan-language newspaper *Avui*. The arrival of Pujol, who was viewed as seeking to turn the paper into his personal political platform, was the cause of, or it at least coincided with, a drop of about 50% in its circulation figures, and its descent into a financial crisis that would become untenable beginning in 1982. Three years later its publication would finally come to an end, with massive debts and a variety of accusations of financial irregularities and allegations of fraud.

Without attempting to be excessively exhaustive, the story of journalistic failures at the nationwide scale would have to include those of the Catholic newspaper *Ya*, the demise of the farright *El Alcázar*, and the disappearances of the more or less ephemeral *Nuevo Diario, El Sol, El Imparcial,* and *Público*, among others, as examples of projects that did not manage to establish themselves, with many similar versions of the same story in cases restricted to more limited territories.

The newspaper *Ya*, owned along with a variety of regional newspapers by the publisher Editorial Católica, experienced times of particular splendour in the years prior to the start of the Transition. Its Christian democratic orientation provided a forum for emerging opponents to the Franco regime as well as to some of the regime's more openminded supporters. Founded in 1935, it achieved its highest sales figures and the peak of its prestige in the 1970s, to the point where in 1975, at the time of General Franco's death, it was the leading newspaper in Madrid, with an average distribution of 177,000 copies. Once the shift towards democracy had begun, its editorial line also began a progressive shift towards increasingly rightwing positions, and it suffered a rapid loss of readers. It may also have been the publication most strongly affected by the sudden emergence of *El País*. From the beginning of the 1980s, the Episcopal Confederation decided to reduce its ties to publishing, and it therefore decided to sell the newspaper to the Basque group Correo (now Vocento), which in turn attempted an unsuccessful relaunch, and after accumulating heavy losses (estimated at 2 billion pesetas (about €12 million) for the 1990 financial year), it was sold to *Antena 3 TV*, which was controlled by Grupo Godó at the time. This arrangement persisted for only a little over a year, before its ownership changed hands again via a sale to the Mexican publishing company Editoriales del Sur, before it was finally acquired at the end of 1994 by Aurelio Delgado, a publisher from Ávila and the brother-in-law of former Prime Minister Adolfo Suárez. Delgado's efforts to keep the paper afloat were unsuccessful, however, and its final collapse occurred in 1996.

The foundation of the *El Alcázar* newspaper had the peculiar characteristic of taking place in the midst of Spain's Civil War during the siege of the Alcázar fortification in the city of Toledo. Years later, after an erratic cooperative experience, it began to take on an editorial stance characterised by a cautious openness, largely in line with that of the thenpowerful Opus Dei. Next, it was acquired in 1975 by the Hermandad Nacional de Excombatientes (National Brotherhood of ExCombatants), which was led by the former minister Girón, and after Franco's death, it became the preferred platform of what was referred to as the *bunker*, that is, those supporting the perpetuation of the Franco regime, opposed to any form of democratisation or restitution of freedoms. One significant part of that paper's history is also its alleged publication of encoded messages used to organise the attempted coup against the central government that took place on 23 February 1981, while its emphatic defence of all those involved in that plot, who were eventually found guilty by Spain's military courts and Supreme Court, is also quite revealing. After that its readership began to dwindle and it started to take on losses and, in the absence of further financial support that would allow it to survive, it finally shut down in 1987.

During the last 40 years there have been no fewer *victims* in the magazine segment[26], many of them having only an ephemeral presence at the newsagents, but others with a much longer history. In that arena, too, there has been an ongoing trend towards specialisation, with the experiences of large

26 Wikipedia lists more than 350 titles that have disappeared from the Spanish market since 1978.

international publishing groups taking on special significance. Their attempts to enter into the Spanish market have yielded inconsistent results, but always well below their initial expectations.

III.4. Surviving online

Will the *paper* die? This is the question that permeates newsrooms, unsettling print media professionals, the subject of conflicting prognostications in much of society. An old Spanish business adage with a slightly different meaning assures us that "everything holds up on paper", but it might also raise the question: can the paper hold up against the Internet? This doubt is undoubtedly based on the fact that newspapers and magazines are not faring well. They face daunting challenges to their survival. This basic fact is indisputable: sales and circulation figures – demand – have been falling steadily for about five years, leading to an unstoppable decline in revenue from sales and, more importantly, from advertising. The causes of this are not entirely clear, although they are generally attributed to the emergence of online media. Yet it has become increasingly apparent that the print media model has collapsed, with the added aggravation that it is unclear what can or should replace it. This question should also be extended beyond the sphere of print media, since the survival of apparently thriving online media, which is far from profitable, is not at all assured either. Perhaps then we should consider whether what is really at stake is the sustainability of a method of disseminating information

– the written word – that so far has been considered *superior* to what audiovisual media offers. A form of media which, by the way, must also face significant changes in its approaches to citizens, and so to its structures and modes of operation. In the end, some of these media sources – ultimately all of them – are affected by the tremendous impact of the aptly or not so aptly named social networks, whose content combines a multitude of elements, including some forms of news reporting, albeit not necessarily primordially.

The impact of technology is not solely a present-day concern. It has always been a deciding factor in the evolution of almost everything, beginning with the media. It is in the present and will be in the immediate future as well. In different ways it has an impact on what might be considered the traditional media, that is, the print media, but no less so in the future of radio and, to a greater extent, television.

It is worth remembering the impact that the movable type printing press devised by Gutenberg had on the diffusion of knowledge. It represented no less than the loss of the monopoly on knowledge held by the monastic orders, and by extension, the Church, which only benefited the dominant castes, and not equally. Other than often distorted or even garbled oral diffusion of information, the only source of knowledge transmission came from the work of copyists, who were virtually all concentrated in monasteries and institutions of a similar nature. For centuries, the ability to read and write was reserved for small minorities, not to mention the ability to augment the common language with texts written in other languages, which greatly limited the

possibilities of access, even for those with sufficient literacy skills. Making copies of a text one by one was surely an arduous task, requiring time and dedication that limited the number of copies of the text and therefore its availability. Of course, everything changed when printing methods appeared and progressed to the point at which a growing number of works became accessible to ever larger segments of society.

A similar leap occurred when the appearance of high-circulation newspapers coincided with higher levels of literacy. News and information gradually ceased to be the privilege of a small group of elites and became available to citizens in different formats and levels of specialisation and quality. This was promptly complemented by radio, which was soon found in nearly all households in the more advanced countries. Radio took advantage of what was perhaps one of the most transcendental innovations of the last centuries: electricity. And it was into an already well-informed population that one of the most spectacular advances of the 20th century emerged: television. Perhaps it is not an exaggeration to say that all these transcendencies have been superseded by the more recent boom – one that is far from finished – of information and communication technologies (ICT). Far more than merely the Internet has emerged under its aegis, although the Internet is usually given the most prominence. Some have dared to label it the *net-everything* boom, in other words, the surrender of much of everyday life to life *online*.

The sudden penetration of the Internet, supported and furthered by the extension of high-capacity and high-speed networks

(broadband and perhaps *super-broadband*), brings with it an endless number of changes in behaviour, consumption and life habits which in this case are very relevant to everything related to the media, entertainment and communication. There is no doubt that it threatens the survival of traditional models while multiplying the choices available to growing sections of society. For established models, this certainly involves a challenge to adapt or, perhaps more accurately, to reinvent. It also opens a considerable window of opportunity to influence sectors hitherto dominated by just a few players, although recent experience has revealed the risk that newcomers will end up in kind of *zero-sum* game in which the *winner takes all*, leading to situations of virtual oligopoly that must be or should be cause for concern.

Before delving into further detail on the different developments in each area, it would be worthwhile to revisit a circumstance that has thus far been immutable: information is power. Or, seen another way, it is a commodity that can be granted, whether it be simple market power or socio-political dominance, or perhaps economic power in its broadest sense. Without diminishing the importance of its potential for progress in improving the well-being and quality of life of citizens, it entails a threat of greater dimension and scope than at any other time in history: the loss of privacy.

In general, there is a lack of awareness of the enormous volume of data every individual sends out every time he or she accesses and uses the Internet. Although not entirely new, a data collection, storage and marketing industry has come into being with unusual volumes of information on habits, behaviours,

preferences and, in short, increasingly accurate profiles of each and every network user, whether in a fixed or mobile location. New forms of advertising, marketing and consumption have also been built on this industry, which are increasingly invasive and, in many ways, involuntary for the recipient. All this has advanced to the point of rendering the various regulations protecting privacy useless and obsolete.

As mentioned earlier, there is little individual or collective awareness of the great wealth of information people inadvertently release into the Internet on a daily basis. This has created a very real data commercialisation industry, which has grown to the point that *big data* is considered to be on its way to becoming a basic raw material of this century, similar to what oil has been in the past. This is not the place to examine these considerations in greater depth, but rather they serve to underscore the almost total lack of knowledge of what agents, service providers and content providers do with this constant flow of information. It is true that some progress has been made, especially in the European Union, but all the advances and regulations have been more formal than effective in terms of conscious management of the Internet. More than the much-prognosticated governmental *all-seeing eye* attributed to *Big Brother* in Orwell's foretelling, it is the private agents that have and handle an infinite amount of personal and behavioural data, as well as ideological data on individuals, with clearly chrematistic objectives.[27] An essential part of these cascades of data comes from the different modalities of the aptly, or perhaps

27 Different authors. *El debate sobre privacidad y seguridad en la Red.* Fundación Telefónica-Ariel, 2012.

not so aptly, called social networks, in their broadest sense.

For the print media, the apparent enemy are *online* sources. This has a double meaning: firstly, there is the threat of potential cannibalisation entailed by their simultaneous presence at the newsagent's and online; and, secondly, there is the competition implicit in the provision of information from media with lower overheads and no cost to end consumers. However, the reality is that both face similar survival challenges due to the lack of profitability.

Starting with the latter, exclusively Internet-based media, so far almost none have managed to deliver a bottom line solidly in the black. Just as with their print *cousins*, a lack of transparency in their balance sheets and operating figures is widespread and standard. The impression, which has not been contradicted, is that they survive by means *protections* from more or less concealed vested interests, or, if that is not the case, by successive capital increases. Free access restricts their revenue generation mechanisms to advertising placements alone, though the time has come for the advertising industry to find a working formula for getting their messages across effectively enough to justify higher fees than the – rather modest – ones that prevail in the online world. The result is that however austere expenditures may be, including the precarious situations of the editorial staff, they have not reached sufficient levels of profitability, and as a consequence, their viability has not been assured, which raises serious doubts about what the near and distant future has in store for them.

The emergence of a myriad of online media has forced traditional media to make inroads into the world of the Internet. This has generally been done by reproducing a substantial part of their print content on their websites, with the aim of securing or safeguarding their leading positions in visit numbers, to the extent that the differences between what is offered online and what is sold later at the newsagent's have narrowed, given that the fundamental characteristic of the Internet as a medium is immediacy. The result of this policy in the financial or business sense has been to create a content cost structure typically found in traditional media with the lower revenue levels typically found in online media.

This leads to the logical conclusion that online media will eventually have to abandon offering content for free, either in whole or in part. But will anyone take the first step? Will they all end up taking it at the same time? To date, attempts to erect paywalls in the Spanish market, to shut off free access to all or some content, have been as timid as they have been unsuccessful and have been abandoned shortly after implementation. That it was not done collectively or simultaneously is probably one of the reasons for its futility, but it is also not clear whether it was ever possible. This is primarily because of the heterogeneity of the competing companies and the real or apparent philosophical-strategic chasm that separates older print media from newer online media, not in the least because of the prevailing culture of free access for everything Internet-related, which is probably more difficult to overcome than the far-from-simple confluence of interests among competitors jostling for positions on the Internet. Nor is the incipient intrusion of the Internet giants into

the game negligible, driven by the *winner-takes-all* reality that has typified the evolution of these behemoths in the marketplace of innovation. Considering the dissemination potential of Google, Twitter, Facebook, Instagram or You Tube, the thought of them establishing themselves in one form or another as news reporting platforms could cease being a futuristic hypothesis and become a concrete reality in the near future.

Survival is in the balance in any case, but the greatest uncertainty centres on *paper* newspapers. Their circulation figures have collapsed, and no one dares to venture where the floor may be, such that there is no lack of prognostications that foresee their total and definitive disappearance. The foundations of their business activities have been disrupted, laying the sector's limited capacity for transformation bare. The management parameters are marked by continuity, all the more so as they apply policies to cut and restrict costs, which are strangely prioritised in the business areas dedicated to content production. So the main victims of *austerity* have been the editorial staff, in the numbers of writers as well as their qualifications, and its logical relation to remuneration that is closer to the *mileurism* (salaries of approximately one thousand euros a month) so well-established in different areas of the economy, especially since the crisis that began in 2007-08. The tangible result has been a notable decline in the quality of newspaper content, which although perhaps not given the weight it should, may be more than a merely contributing factor in readers' loss of interest and their reluctance to purchase a copy. The fact that this is not the only reason for diminishing sales does not mean that it is not contributing to the threat of

disappearance.

In fact, the strategy selected by newspapers contains paradoxical elements, some of which have already been mentioned, not all of which are easy to understand. This is the case, for example, with their urge to increase the price from time to time while their circulation decreases. It is not surprising that the increase in the cost to consumers is accompanied by a sharp fall in demand, but that is what the publishing companies have been doing, in unison, and so far this *coincidence* has not merited any open action on the part of the National Commission on Markets and Competition, just as it has not been arbitrated before by the Spanish Competition Tribunal. Did the coincidence in the evolution of prices not seem to them an appreciable symptom of anti-competitive practices or collusion? It seems not.

The paradox of applying the above-mentioned cost reduction measures preferentially, sometimes almost exclusively, to editorial offices is no less relevant. The differentiating factor between some newspapers lies precisely in their content, quality, and reliability, in short, their *value added*, since they do not differ in other characteristics, including availability to potential readers. Their production processes are similar, lately even shared in the same printing plants. Distribution is also done completely or partially jointly, assigned to the same companies and delivered to the same points of sale – newsagents – which also deserve some commentary by way of reflection.

With origins that many prefer to forget, newsagents have a practical monopoly on making newspapers available to

consumers. Subject to municipal concessions, often passed down through the family, their business is quite distinctive, at least as far as newspapers and magazines are concerned, without getting into the other *products* they usually offer. The sale of publications naturally is subject to a commission applied to the cover price, usually around 10 percent for newspapers, and somewhat higher for magazines and other types of publications. What makes the arrangement unique is that copies are purchased on deposit, that is, they are not paid for when the distributors make their deliveries. Payments are made every two or more weeks, with unlimited returns of unsold copies. In other words, it is a sales operation without financial risk or stock costs. And these conditions apply to normal copies. When a promotion or supplement is offered in addition, the commissions are raised more or less at the discretion of the newsagents' association, without competition between them with regard to the publisher. This business model has worked better than well for quite a long time, although it is true that it has been impacted recently by plummeting readership and, in some cities, more restrictive criteria from the municipalities regarding the granting of new concessions and the renewal of concessions already granted. What has never been objectively evaluated is the negative impact that this point-of-sale monopoly may have had on circulation figures. In any case, there is no doubt that the difficulties inherent to limiting consumer access to a product – location, opening and closing hours, etc. – are not exactly an incentive to purchase it.

The role of distribution systems in the value chain, along with their end points monopolised by the newsagents, should be

emphasised. Between the two of them, they take between 30 and 50% of the revenue from each copy sold at a price that falls far short of covering the costs of the processes involved in writing, producing and bringing every issue to market. In most cases, the cover price of a newspaper accounts for less than half of its costs, which means newspapers are dependent primarily on advertising revenue for their survival. The downward trend in recent years, with ad campaign investments increasingly shifting to other media, particularly television, is logically also at the root of print media's apparent viability problems. However, it must be said that the advertising revenues it brings in are still vital and significantly higher than those for the online version, which leads to an apparently unsolvable paradox: although the declining trend in sales and circulation of physical print media – the *paper* – is very often paralleled by an upward trend in visits and clicks for the online versions, publishers find it difficult, if not impossible for the moment, to consider dissolving their traditional newspaper, even though many factors and circumstances indicate that the aforementioned downturn will continue.

Among these factors, the role of the newsagents in the distribution system bears reiterating, and, more concretely, their exclusive privilege. If, as mentioned above, they have supposedly always represented an obstacle to the penetration of the *paper* with consumers, the effect is reinforced every day with the evident disappearance of newsagents everywhere. There are already many medium-sized towns that lack this kind of point of sale. The same thing is happening in the big cities, not only in more or less peripheral neighbourhoods, but also in the heart of

the city. One might imagine this to be a direct consequence of the decline in demand and therefore in sales, but it is still more likely a result of what is usually called *vicious cycle* or more colloquially, a catch 22: the reduction in locations available to consumers to acquire a product leads to a reduction in the tendency to acquire it due to pure impossibility, which in turn leads to further disappearances of points of sale. What is perhaps most striking is that apparently nobody has considered abolishing the monopoly enjoyed by newsagents in order to both not reduce the market potential of the media and to ensure that, within the framework of the other activities – or establishments – of the distribution chains, the sale of physical publications returns to profitability. Likewise, perhaps it is time to revisit the restrictive newsagent system, to give them the opportunity to take advantage of the potential offered by their locations, beyond strictly selling publications, and make it profitable. In fact, some have already gone into other *sales* of widely varying types.

Although not at all linked to the future of the physical newspaper, but necessary to paint a full picture of technological developments, news agencies and their trajectory thus far also merit mention. The last four decades have seen some agencies disappear, such as the state-owned Pyresa, the consolidation of EFE, also publicly owned, and the private enterprise Europa Press. New agencies have also appeared, such as Servimedia, owned by the National Organisation for the Blind (ONCE), as well as others that are regional in scope, such as Vasco Press in the Basque Country and the Catalan News Agency in Catalonia.

The most important without a doubt continues to be EFE, founded in Burgos in the last months of the Spanish Civil War, leaving the origin of the chosen name unclear (forever?), the F being the initial of Franco's surname, maybe, or perhaps a reference to the fascist political organisation, Falange, of the winning side? None of EFE's founding members completely clarified the name choice, although one of them assured years later that the name was chosen because the EFE's original headquarters were in the Editorial Falange Española building. Be that as it may, at the end of the war the operations of the now defunct Fabra Agency, which had been supported by several Spanish newspapers, as well as the assets of the Faro y Febus agency, also defunct, became part of EFE. So, in the end, EFE was incorporated as a commercial enterprise with the state as a majority shareholder under the aegis of the National Institute of Industry (INI) and the General Directorate of State Patrimony. In 2001, it became part of the state-owned industrial holding company Sociedad Estatal de Participaciones Industriales (SEPI).

Over its last forty years, EFE incorporated the firms Cifra, Cifra Gráfica and Alfil under a single management and brand, as well as the Fiel news agency, acquired in 1968 to begin offering services in English and French. Over the next two decades, the agency increased its presence in Spain and abroad, with a total of 180 offices in 110 countries, and more than 3,000 employees representing over 50 nationalities. It also gradually introduced new technologies, creating new services like EFE Data, and starting satellite news broadcasting. Its documentary and graphic archive was especially remarkable: after incorporating new technologies, it was comparable to the archives of large

international, European and American agencies. In the same vein, in 2007, EFE also began offering audiovisual news service, and as the autonomous communities of Spain were being consolidated, it started launching versions of its service in Catalan, Galician and Basque, while simultaneously strengthening its online presence (www.efe.es).

On the initiative of the Luca de Tena family (*Prensa Española*, *ABC*), a private news agency was founded in 1953, initially called Europa, that competed directly with EFE. After incorporating new members, several with links to Opus Dei, it undertook an ambitious implementation plan and adopted what would become its definitive name: Europa Press. The enterprise took on special relevance, offering an alternative point of view to the state-run EFE, with incipient hints of pluralism and rifts with the government that verged on decreeing its dissolution on many occasions. The most delicate moment came during Manuel Fraga's term as head of the Ministry of Information and Tourism in the 1960s due to his intention to force a merger with EFE, which was ultimately never consummated because its main stakeholders rejected the plan. In the final years of the Franco regime, Europa Press tried to sidestep the limitations imposed by official bodies on reporting and information, among other ways through the launch of *Resumen Económico* in 1970. A subscription publication distributed by post, it offered news on political and economic current events that the media could not or dared not publish due to persistent administrative coercion until the beginning of the Transition. From there, the agency undertook a far-reaching plan to expand throughout Spain, intent on not losing ground to the plans of its main competitor. In time, Europa Press also decided

to join the march of technological innovation, launching a digital production facility that combined text, image and video with the aim of consolidating its online position. At the beginning of this decade, however, it began suffering losses and was forced to alter its strategy, which has allowed it to continue operations for the time being.

Since 1976, several enterprises have disappeared in the news agency sector, including the state-owned Pyresa, linked to the Editorial Católica's news agency Logos; the seasoned and privately-owned Mencheta; as well as some quite ephemeral ventures such as OTR Press. At the same time, Servimedia, owned by the National Organisation for the Blind (ONCE) and very much oriented towards producing news with significant social content, emerged powerfully and gradually consolidated its position. It began operations in 1988 and expanded to the production of press, radio and television summaries – *newsclips* – for public and private entities. One of its most distinguishing features is that around 40% of its staff positions are reserved for people with some kind of disability.

As much as attention has been focused on the impact of technology on the future of print media, it is also enormously disruptive in the present, even more so for the foreseeable future of television. Even today, the predominant model for the provision and consumption of information is still traditional broadcasting of general content over the airwaves. The scheduling is decided internally, although streaming services are increasingly being offered that allow viewing at times freely chosen by the viewer rather than only at those determined by

programming departments. Broadcasting also remains primarily open-access, with no cost to consumers, and funding is based exclusively on advertising content shown during commercial breaks. Access to the medium continues to be mainly through antennas, especially collective-community antennas. It is provided in digital format, in Spain, generally referred to as digital terrestrial television (DTT), and requires a state-granted licence for the exclusive use of an assigned frequency on the broadcast spectrum. However, this is a technological means of transmission that will be replaced – better sooner than later – by already increasingly common and easily accessible broadcasting over broadband networks to fixed and mobile end points. This is already the medium of choice for pay TV platforms, clearly an evolutionary step forward from primitive cable networks, as well as for companies strictly offering streaming services, which currently focus more on pure entertainment products – films and series – but which are in the nascent stages of offering themed content as well as sports and other services.

What is already quite remarkable is the change in the means of reception. The traditional television, often presiding over the domestic living room, is now complemented by the personal computer – a PC or laptop – and increasingly by an ever-widening range of versatile tablets and smartphones, whose options and ease of use are constantly expanding. Both the former and latter are being enhanced by the planned universalisation of fibre optic networks – already in place in some urban areas – the extension of 4G mobile networks, and the very imminent introduction of 5G technologies. The performance in terms of speed and capacity provided by bandwidths of several hundred megabytes offers a

wide range of possibilities, from high definition (HD, UHD, 4K, etc.) to forms of interactivity yet to be developed commercially, that will eventually lead to widespread consumption of à la carte, on-demand and ubiquitous television. The scope of the already apparent changes is foreseeable: migration from a family-collective type of consumption in which practically all content in the home is shared conjointly to another type of completely personalised viewing in which each individual chooses what, how and where to watch.

This transformation, which is present and foreseeable, undoubtedly involves profound changes in the structure of the television business both in advertising revenue – resulting from the growing fragmentation of audiences – and in the different pay-per-view modes, with an already appreciable and probably growing trend in subscription packages, presumably integrated into more comprehensive communication service packages. At the same, and not to a lesser extent, this presupposes a very significant change in the role played by the state in the television sector to date.

If, as anticipated, DTT is replaced sooner rather than later by access via fixed and mobile telecommunication networks, the granting of broadcasting licences will no longer hold its current significance, and there is no doubt that technological advances and developments that are leading to the provision of new options for consumers are helping and will continue to help in this regard. The progressive deployment of networks that can provide increasingly greater bandwidth, whether through optical fibre (fixed location) or now with 3G and 4G or in the near future

with 5G (mobile), together with advances in the capacities of the different devices have already multiplied the options available for television *consumption*, leaving the traditional means described above almost as a relic of the past. Today, almost every television on the market is a smart television. The best features of home routers allow powerful Wi-Fi networks in the home and modern smartphones and tablets to access any television content just as well as a PC or laptop can. In fact, several studies have indicated that under-30s predominantly make use of devices other than television. Directly related to this is the convergent trend of content providers-producers, telecommunication operators and Internet stakeholders, with or without competition from traditional stations or channels.

Although not entirely coincidental, similar processes may also be forthcoming in the radio sector, both in terms of signal distribution and access and concerning governmental intervention in the sector. In some ways, radio broadcasting has demonstrated an enormous capacity to adapt and survive, which conjures up the omens of its certain demise at the hands of television. Much like television, there has been a significant and accelerating migration in the consumption habits of listeners. On the one hand, this has taken place by means of the offer of live broadcasting of all programming, but also by allowing and even encouraging on-demand listening through already popular podcasts in which any content previously broadcast can be recalled, thus allowing consumers to choose what interests them. It faces a few challenges moving forward, such as offering greater listener interactivity and enabling downloading and recording similar to the streaming mentioned above in relation to

television. However, at least in the Spanish market, it seems to have missed its opportunity to migrate to digital formats that provide better sound quality, more uniform reception anywhere in the country, and the aforementioned options for interacting with listeners. Perhaps as an alternative, there is an increasing penetration of modes that allow devices such as PCs, tablets, smartphones, etc. to access their web platforms. Likely in keeping with this, it is important to point out that the industry that produces receiving devices (radios) has far from demonstrated the innovative capacity or potential of the new generation of televisions, sometimes made by the very same companies.

The foremost innovation in the media of the last decades, especially since the turn of the century, has unquestionably been the profusion of online media. In principle, they seem to be the clear winners for the foreseeable future. However, their survival is not guaranteed and will not be easy, at least in their current form, both in terms of their business models and in terms of the apparent proliferation of options that would suggest saturation earlier rather than later. So, uncertainties abound – outstripping certainties by far – and there are many facets that merit clarification.

Technological progress has led to the creation of a news media that has far lower investment requirements than traditional newspapers. But online media is neither free to launch, nor free to sustain. At first glance, it is clear that there are no costs related to printing, internally or externally, nor pre-press costs or paper expenditures. Nor are they burdened with the not

inconsiderable costs of distribution to and at the point-of-sale – but they do have to bear all the other costs associated with traditional print media. On the revenue side, there is no sale price to be taken into account – for the moment – with these organisations depending solely on advertising revenue. For now, the equation does not quite add up. Actually, in practice there is a trade-off between the costs of the work done by professionals and *intimately* linked to content – which are not insignificant – and an advertising presence not yet firmly established in format, in price or, more importantly, in volume. As risky as it may sound, it seems that the advertising industry has not found the ideal format in which to place its messages, while at the same time, digital media sources are far from reaching a sufficient degree of reliability in terms of actual dissemination to allow advertisers and agencies to calculate, even approximately, the potential return on their investment. The logical consequence is that the effectiveness of advertising placement on websites is far from clear.

In online media, the prevailing assumption is that is absolutely free, which, in the end, characterises the Internet itself. It has been repeatedly demonstrated that Internet users are very reluctant to pay anything to surf the net. It matters little that the apparent absence of cost is not really accurate, since a price is indeed paid for most websites, applications and services, albeit not a monetary one insofar that it involves the capture of huge and never-disclosed volumes of personal data that the owner-managers of the site in question are prepared to monetise. In fact, selling or otherwise using the information collected from Internet users is the essence of the business model, i.e. revenue

and profit, for the majority of websites. Does it need to be said that it involves trading in privacy?

For traditional print media, newspapers and magazines, their online presence has led to a kind of schizophrenia in terms of strategy and management. First of all, they have no choice but to develop and promote their own websites to position themselves in the market, and, if possible, attract more traffic – visits – than their competitors, both those who compete at the newsagents as well as those who maintain an exclusively online presence. To do this, they must offer their best content online, which means they must take the essence of what they are going to offer hours later in print with a cover price and make it available free of charge. This has given rise to doubts and unending hesitation as to whether to favour or not favour one product, the online version, which is actually cannibalising the other, the *paper* product – a circumstance that is becoming more acute to some extent as editorial offices are becoming more and more unified, with a single staff dedicated to creating content for the traditional newspaper as well as its homonymous online double. However, this bidirectional system is not found exclusively in the newsroom. Something similar is happening in advertising management and, of course, when it comes to investing and managing material resources in one or the other option. All this should be considered taking into account two circumstances that are not at all negligible: firstly, evidence that revenues generated by the paper product far exceed those obtained on the web, and secondly, the fact that a large part of the traffic captured on the web derives from the prestige of the product's brand/title. It is sufficient to review the online media rankings to see that the

most visited sites are usually those with similar positions in print, and, in every case, they rank higher than the most visited sites that only have an online presence.

A theoretical, and hopefully detached, view would suggest that there is great potential for the print and online versions to coexist. In a way, this echoes the debate that once raged on whether or not radio had any chance of surviving the advent of television. Both have demonstrated, and continue to demonstrate, that they can maintain their respective positions by means of specific characteristics that ultimately tend towards a complementary relationship. It is clear that radio offers benefits that go beyond the scope of television, including immediacy and the capacity to be received anywhere, as well as its compatibility with other activities like driving, while television provides the enormous potential of the image and visualisation of any piece of news, with everything that entails. In any case, it is true that both media have come a little closer to their potential. In particular, television has made great progress in terms of immediacy to a large extent by taking advantage of technological tools such as professional desktop publishing cameras, 3G and 4G data transmission networks, and even increasingly sophisticated and versatile smartphones. There is, however, still a sufficient degree of differentiation to envisage the survival of both, at least in the medium term.

Similar assessments can be made for newspapers, magazines and websites. Aside from their potential, immediacy and the ability to combine text, images and sound, there are undeniable critical attributes that differentiate them from other options, including

radio and television. They are also served by growing and increasingly universal ease of access, whether through broadband networks (fibre optic) in fixed locations, or through the new generation mobile networks (4G and very soon 5G) in any location. In short, if we add the versatility of Wi-Fi connections to these possibilities, there is little doubt that only a lack willingness or explicit desire would prevent one from always being connected or able to connect to the web. Does this leave *the paper* with nowhere to go? It shouldn't. In fact, all the advantages described above for online broadcasting have limitations that do not affect or can easily be overcome by traditional print media. The main advantage, which might be considered decisive, is that deprived of the advantages of immediacy, the print media can provide *value added* that this immediacy – a basic requisite that cannot be renounced in online activity – has no real possibility of offering. One could say, accurately, that there is no technical obstacle to pouring all kinds of content onto the web, and in fact, content of all types does circulate on it. However, it has been demonstrated that the extent and perhaps the *density* of the content very often runs counter to the preferences of Internet users. Related or not, it is somewhat surprising that the sales of physical books continue to be well above sales of e-books despite the cost of the latter being approximately 50 percent of the former, not to mention their alleged ease of storage and portability. This has not happened in a similar way with music sales and distribution, where downloading and online shopping sites have gained virtual supremacy over traditional CDs.

If the complementarity of online and *paper* media is taken as a given, or perhaps their potential for coexistence, the pivotal element is and will continue to be the contrast between cost-free or paid access. In fact, this is the only thing that all forms of media truly have in common, regardless of the channel or platform they use to bring content to users. Both traditional print and online media are now seriously compromised in their viability, vacillating between loss, debt and often constant capital increases. And, it is more than evident that they share absolute dependence on advertising revenues. However, these tend to be rather limited in the print media and have not really taken off and remain insufficient for online activities. There is, for different reasons, a certain degree of confusion in both types of publication. In the case of publishers present in both media, the overall nature of advertising contracts makes it difficult to determine – to know – which part of the investment, that is, the advertisements, will be allocated to each of them. Meanwhile, in the case of online advertising, whether solely online or complemented by other types of media, there are myriad doubts as to the efficacy of systems for measuring traffic, i.e. visits, page views, time spent online, etc.

In short, there are two issues that must be resolved sooner or later. And these are issues that seriously compromise not so much the possible outcome of the dichotomy regarding the survival or disappearance of the *paper*, but the very future of online media, whether or not this platform is used exclusively: firstly, charging for access to content and, secondly, accurately measuring the parameters used by advertisers and agencies to direct their advertising investments to one medium or another. Theoretically,

the former seems easier than the latter, but so far neither of them is even close to being resolved.

Taking a strictly logical stance, since producing content incurs costs, and not necessarily lower ones, accessing it should involve payment as with any other product or service on the market. This is especially true when content is offered in another medium – print – and has a fixed purchase price. But this logic clashes with several realities: firstly, and perhaps most importantly, the presumption that everything on the Internet should be free, and secondly, that competitors in the information industry – radio and television stations – do not charge for access, with few exceptions such as specialised audiovisual channels that require a subscription. It also clashes with the fact that some online media that have erected paywalls, charging in whole or in part to view certain content, have had little success. In many cases they have been forced to re-release their websites to stem the loss of traffic and halt their drops in rankings. It is possible, however, that the problem was not so much the fee itself, but the way it was handled. This appraisal is based on the fact that some media sources in other markets, although of traditional origin and considered to be *of quality* in every instance, are enjoying some success with the strategy of differentiating content and charging for access to it. The clearest example is the *New York Times* (*NYT*), whose online version has three million subscribers and already generates almost a quarter of the paper's revenue, although it has not reached the level of income generated by the *paper* version (35%). About half of paid subscribers to *The Wall Street Journal* (*WSJ*), another of America's flagship newspapers, are users of their online version, some 1.5 million people. An

analysis of the European market paints a very different picture, perhaps partly because of the different social and consumer cultures on the two sides of the Atlantic, but also perhaps because of the different natures of their press markets. One should not lose sight of the fact that most American newspapers are predominantly local, such as the aforementioned *NYT*, and only a few, such as the *WSJ* mentioned above or the popular *USA Today*, publish editions with nationwide coverage. On this side of the Atlantic, European media sources that have established pay-per-view systems have achieved much lower figures and, as such, revenues that far from match those generated by the paper version. The publication that has reached the highest levels of online subscriptions is the *Financial Times*, with nearly 750,000 subscribers to its paid version launched in 2002. Much lower figures are seen with the British publications *The Guardian* (500,000), *The Times* and *The Sunday Times* (240,000) and the French publication *Le Figaro* (100,000). Although several Spanish companies have announced plans to set up pay systems, so far only a few of the Vocento Group's titles have implemented them, and no reliable subscriber figures are known. However, there is a widely-held conviction that sooner or later some form of payment will be required to access content on the Internet.

As noted above, actual web traffic figures and how they are characterised have proven much more difficult to profile so far. To clarify, the general conviction is that the data offered by the media itself is faker than a wooden euro, to use a colloquial expression. Similarly, none of the metrics which have theoretically been established independently and objectively

enjoy sufficient credibility, as is the case with Comscore[28], so everything operates within a sort of nebula that does nothing to support the viability of the online news. The underlying cause in this respect is somewhat complex, but two elements seem to stand out that distort and, in reality, render the official traffic figures corrupt: the services and applications that are provided through the sites being measured, which have nothing to do with the essential news product; and, of equal or greater relevance, access through a search engine, mainly Google. In the first case, for example, if an Internet user accesses a game site or a flight information page via an online newspaper, should that incident be counted in its statistics? Or when traffic is directed to one of the medium's secondary websites, necessarily through its front page, what calculation is applied? All of this gives rise to a tendency to organise and present content that is excessively conditioned to generate the coveted clicks, very often forcing – perhaps even falsifying – headlines that do not match the information or content itself. Does this result in a certain propensity for sensationalism that is beginning to be seen in some online media?

The second case regarding Google is presumably more complex and has led to unresolved controversy involving the media and the most widely-used search engine on the Internet. There are several points of potential conflict. The first relates to the fact that media sources bear the costs of producing content and Google obtains advertising revenue by facilitating access to it. Google claims that its intermediation generates traffic that, in

28 Comscore is a company that specialises in online marketing (www.comscore.com) founded in 1999 in Reston, Virginia (USA).

one way or another, benefits the businesses. But this raises another point of controversy, namely the *forced* ranking of some content higher than other content, the result of applying opaque algorithms used by Google for spatial planning. There is also the suspicion that these codes are subordinate to its business strategy, although this claim is denied by those in charge. And one final controversial point is whether or not Google's routing allows advertising included in the media source to be displayed.

It has become apparent that the cornerstone for the future of online media is no different from one that has been conditioning the success of all other media sources (print, radio and television): advertising. Its contribution to online media revenues is not yet sufficient to cover costs or make it profitable. The truth of the matter is that agency and advertiser investments are still not directed primarily towards online media. It has no potential capacity, in other words, to subtract investment from other media sources, and especially not from the top advertising platform, which is still television. This is undoubtedly attributable to the lack of credibility, mentioned on various occasions earlier, of the calculations of actual traffic counts, which are obviously necessary to assess the profitability (impact, recall rate, capacity to incentivise, etc.) of advertising investment. But it may also be that the industry has not quite found the right way to position its messages in web products. Those that have been tested so far – static ads, banners, pop-ups, links, etc. – have not proved sufficiently effective, and it is widely known that there are tools to disable them available via the Internet itself.

A separate question, which it is surely too early to tackle, is the impact that future and more or less foreseeable advances in the field of artificial intelligence (AI) will have on the media world. So far, the automation of processes, insofar that it threatens a large part of the current job market, has focused on tasks that are somewhat repetitive, in which the contribution or role of technology has been deemed a suitable substitute for human effort. The future may, however, be different. In fact, in many respects, machines are already performing tasks and executing processes which require some degree of rationality. Will jobs that up to now have been the exclusive sphere of IT professionals be automated with algorithms and other AI tools? As much as it is already felt or intuited in some specific respects, the reality is that when it comes to the future of AI there are fewer certainties than there are suppositions and speculations, which are almost always peppered with trepidation and fear. In any case, this will have to be taken into account both because of what it may represent in terms of journalism as a profession as well as in what it may imply in terms of its impact on society.

In short, although the focus for the future seems to be more on the possible or unlikely survival of the *paper*, there is no lack of uncertainty and doubt about how the future will be shaped – far from being completely assured – by the media currently online, and, in more general terms, news reporting, which is to say professional journalism.

IV. Another journalism?

Since it is apparent that journalism has changed significantly in recent decades, one might wonder whether we are on the verge of an even more radical transformation. Surely it is not advisable to confuse the future of the media, particularly the print media, with the future of journalism as a means of mediating between facts and society's knowledge of them. Perhaps it is more fitting to summarise all of this in terms of what it is really about: reporting, including analysing, contextualising and even conceptualising reality. It is important to acknowledge that this is no easy task, when mere noise and what is rightfully called news or information intermingle and overlap, regardless of whether it has happened before or not. These are times in which people probably have more options available to them to receive news or information than any other period in history. At the same time, and perhaps for that very reason, they face greater difficulties in discerning noise from news.

Noise emerges in concentrated forms around many different issues. One of them is the assumption that by eliminating the professional intermediary, the journalist, information is or can be *democratised*. It is important to recognise just how much that word is used and abused, to dignify or disqualify, any

controversial issue. But to attribute it to forms of communication that are supposedly more *democratic* than conventional forms of journalism bypasses at least two very relevant circumstances: an absolute powerlessness to defend against falsehoods due to the lack of effective filters, and the commercial substratum that underpins almost all social networks in their current form.

IV.1. Asocial networks?

Social networks are, without a doubt, the most remarkable phenomenon of these times. But, is *social network* an apt term? Something that is not at all clear and that is definitely worth asking is whether the social connections that the networks promote transcend the virtual. Or, from another perspective, are they too conducive to the creation of false profiles, fictitious personalities and experiences that, while not claiming to be news, have no real basis? In any case, this is an issue the scope of which has only been partially studied – which is logical, given its novelty.

This is not the place to go into an in-depth analysis of any social network or its unquestionable impact on our lives. That is not the underlying purpose here at all. Nor is it a question of denying their virtues or usefulness that, beyond individual appreciation, are manifested in their rapid and widespread proliferation. However, we should still consider what they represent as a channel for the propagation of purported or real news, to some extent with the intention of becoming an alternative or even a

substitute for the traditional means of diffusion. Some have even dared to propose that a kind of new journalism is being developed or produced through them, even seeking to confer the status of news on messages comprised of the original meagre 140 characters – a number that has already been increased – that usually make up a tweet.

Given that there are and can be as many different interpretations as there are preferences, the growing and often decisive presence of social networks cannot be ignored. Indeed, their importance transcends the impact attributable to their growing numbers of participants and users. More crucially, the most well-established ones are becoming central to technological development, to new businesses, and to the new approach to providing goods and services, which some call the collaborative economy, others online for everything, and still others the fourth industrial revolution. Google and Facebook are already at the core of numerous platforms and services penetrating the market around them, with the clear ambition to take dominant positions through aggressive policies of acquiring competitors and affiliates in their areas of activity. The larger question is whether or not people are accordingly aware of the scope and consequences of this penetration in a dynamic in which the *winner takes all*, in other words, in a situation with monopolistic tendencies, very much a real oligopoly.

Although not many for the moment, some voices have begun to be raised in criticism of the dynamics and influence of social networks, especially with regard to the filters – or lack thereof –

used for the diffusion of news and reports to society.[29] In a way, social networks have taken on the discriminatory role that until now has been played by the traditional media. Without delving further into an analysis of the phenomenon, which is beyond the scope of this work, it is important to look at one aspect that very much differentiates social media from traditional media: its potential for quasi-instantaneous diffusion, which some have defined as *self-multiplying virality.* As one might imagine, its occurrence can be seen as positive or negative depending on the characteristics of the content in question, in other words, depending on whether it is a truly newsworthy event, an opinion that is credible, let's say, something meant purely to shock, or a blatant fake. A good part of this capacity for *self-multiplication* comes from the means and mechanisms employed in social networks; *followers*, *likes*, *shares*, etc. After all, this is a potential that the traditional press – radio and television – has never had and still do not have within their grasp, although it is interesting to note that practically all of them are active participants on the most popular social networks: Twitter, WhatsApp, Facebook, Instagram, YouTube, etc.

There are some very big questions looming over social networks. Will they end up replacing the media? Can they be considered media? The answers are not easy, especially with regard to the future, which is always difficult to foresee. However, to a great extent it depends on how journalism is regarded in each society. We have already touched on the differences that distinguish traditional media from what social networks represent: the

29 Eli Parisier, *El filtro burbuja.* Taurus Pensamiento, 2017.

existence, even if theoretical, of filters and safeguards to ensure the most accurate possible conveyance of information – the case with traditional media – or full freedom to release all manner of content, regardless of whether it is true or not, onto the web. It is clear the former requires adequate structures in place and at least a certain degree of professionalisation and therefore knowledge on the part of those involved. For the latter, however, only a minimum of syntactic and technological literacy is required, in other words, it is enough to simply know the basics of how to read and write and how to handle devices that can interact on the Internet. Proof of this is found in the frequent of spelling mistakes in the content on Twitter, YouTube and Instagram, just to mention a few of the more active ones. Will corrections or remedies be forthcoming in future AI advances?

It is often overlooked that *closed* social networks, whose access is in principle limited to circumscribed communities, such as Facebook and Instagram, or others with a supposedly more binary correlation such as WhatsApp, Telegram or Line, are having an impact on today's communication phenomena. But they are having an impact, and not a minor one. This is because the propagation of content is greatly facilitated by these applications' own tools, in the form of chats or forwarding to everyone in a predetermined set of contacts, which gives it very high potential for *going viral*. As a result, hoaxes, rumours and malicious fakes have spread with extraordinary speed. This experience also shows the extent to which these survive – despite being widely refuted or shown to be false – in the collective imagination, or in the individual memories of those who have seen their particular beliefs confirmed. One of the characteristic

habits found in addiction or loyalty to a medium is whether the news it offers and the opinions it conveys coincide with or disagree with the beliefs of the reader, listener or viewer. Sociometric studies have shown that interest in a piece of news is not so much driven by wanting to know the exact details of the situation, but rather by whether it reaffirms the reader's prior beliefs on the matter. In other words, the reader tends to give more credibility to the version that fits his or her previous assumptions, and similarly tends to give less credibility to the version that does not fit his or her convictions. To cite a very current example, those who consider a certain party to be fundamentally corrupt will gladly listen to any news of alleged misconduct it may be involved in. Conversely, people who consider the same party to be a paragon of virtue will tend to refute, disbelieve or consider false the same news announced in the media. Expressed somewhat crudely, knowing the truth is less important than being right. So, measuring the impact of any channel of communication is extremely complicated, notwithstanding the suspicion that some have a greater potential for harm than others.

Even without a drive to regulate or to regulate to excess, almost everything about social networks is clearly yet to be regulated. One area where progress seems to have been made lately is the greater protection offered by the *right to be forgotten*, which means the power to have anything understood to be harmful to individuals or groups deleted from the Internet. However, this right is exclusive to the European Union (EU), and asymmetry between the two sides of the Atlantic in all matters related to privacy persists. Be that as it may, the reality is that most people

tend to feel that they are not protected on social networks, although others feel shielded by them, aware that whatever they do, whatever they say, they will most likely remain hidden in anonymity or, in any case, exempt from punishment. It would therefore not be an exaggeration or inordinate to say that social networks have social and asocial elements simultaneously in their making.

IV.2. *Fake*: the same old lies

Far from leading the fight against it, many media outlets have succumbed to the temptation to incorporate anything and everything into their content offerings. Immediacy, the obsession for exclusivity, or in its absence being first, getting the scoop, and in the online world the obsession for generating clicks, have more pull than the traditional fact-checking. Thus, fakes, the intentionality of which is increasingly beyond a doubt, have permeated almost all media, whether or not they originate in the broad and diverse world of social networks marked by universal access and orphaned by oversight.[30] Fakes generally appear in content disseminated online, but not exclusively, and are often versions with the same heading as their print media, radio or television analogues. However, what one should recognise is that they emerge more frequently in digital media, the survival of which is understood to depend first and foremost on the acquisition of the so highly venerated clicks.

30 Marc Amorós García. *Fake News. La verdad de las noticias falsas.* Platform Actual, February 2018.

Faced with this situation, people are very often hesitant to place their trust in anything. Until recently, information was disseminated from recognisable media sources that could be granted or denied reasonable degrees of reliability. Today, however, it is difficult if not impossible to identify where information comes from, all the more so when it is common for media organisations to not cite the sources of their news. Add to that the increase in the number of rarely acknowledged *blunders* and it cannot and should not come as a surprise that some news recipients show increasing degrees of scepticism, if not disbelief.

Fakes are an undeniable part of our present, but is there anything new about them? In a sense, yes, they have found an unprecedented way of reaching large audiences. What has not changed is their essential nature: usually intentionally invented, pure lies that clearly seek to benefit some by harming others or, at best, are purely and simply for amusement. Believe it or not, they have even spawned a fledgling industry, with sites and companies cleverly specialising in producing – either on their own initiative or in response to an order – all manner of hoaxes, rumours, falsehoods and misrepresentations, no matter how far or close they are from the truth. Beyond the purely informative aspect, the rise of fakes on the Internet generates suspicion and mistrust of the online world. This is compounded by an absence of clear standards, also at the international level, and the lack of disciplinary measures for misconduct or even criminal activities. It is true that the structure of the Internet does impede if not completely prevent ascertaining the origin of the alleged offenders, their degree of responsibility and location, but this does not preclude establishing measures that should necessarily

be common on a global scale. Needless to say, one of the phenomena that a scenario such as this propitiates is the ease with which all kinds of fakes can be spread without any risk.

Without delving too much into past civilizations, there is evidence from a range of sources that everyday life in the Roman Empire was full of falsehoods, rumour spread orally, which distorted the public's perception of reality.[31] From then until now, there has been practically no historical period that has not been contaminated by the dissemination of what we now call *fake news*. There has been fake news of all kinds with varying degrees of influence, but all of it has been accompanied by pivotal historical moments. For example, many wars have taken place under the protection of fake news, including, notably, the war that pitted Spain against the United States at the end of the 19th century. More accurately, it happened the other way around, since it was the US government that initiated hostilities in Cuba, starting with the deceitful and falsified fire on the *Maine* in the Port of Havana. The Hearst newspaper group played a crucial role in fabricating and disseminating news falsely attributing the attack to Spanish colonists. At the time, it was competing to take over the tabloid market – the *yellow* press – with its counterpart, Pulitzer, which curiously would lend its name to one of the most prestigious international awards in journalism. After some time, the explosion on the ship was revealed to be a self-inflicted attack caused by bombs placed in the hull. At the time it was labelled a fabrication, whereas today there would have been talk of *fake news*. The rest of the story is well-known; the war ended

31 Néstor F. Marqués, *Fake news de la Antigua Roma.* Espasa, 2019.

with the defeat of the Spanish, who lost their last overseas colonies: Cuba, Puerto Rico and the Asian archipelago of the Philippines.

Similar ruses have given rise to other major episodes of warfare. For example, Hitler created a fake border incident to justify the launch of Operation Barbarossa and the subsequent invasion of the Soviet Union in July 1941. And then there is the profusion of falsehoods perpetrated by the Nazis against the Jewish people, from the unreal attribution of *The Protocols of the Elders of Zion*, which consisted of planned mass poisonings and kidnappings and killings of children, to the Reichstag fire that gave rise to *Kristallnacht*, or the Night of Broken Glass, and initiated the brutal pogrom that culminated years later in the monstrous Final Solution. Many more examples of deliberate falsehoods can be cited, and many have been used *a posteriori*, including those much closer to home regarding the Spanish Civil War. According to Franco's history, the generals who staged the coup against the Second Republic made their decision based on the assassination of the right-wing monarchist leader José Calvo Sotelo on 14 July 1936, or at least, their decision was hastened by it. There is ample evidence, however, that the orchestration of the coup d'état began upon learning of the victory of the Popular Front in the general elections of the previous February, and the date was set at least several weeks in advance, not to mention the fact that Franco's regime had been propagating the notion that the republican authorities intended to proclaim a communist dictatorship under Stalinism in Moscow. The falsehood was thoroughly disproven when documents from the former Soviet Union were released from secrecy and the real events that took

place in the first months of the Republican presidency of Manuel Azaña were revealed.

Logically, some lies have been more transcendental than others, speaking of the most recent. Among the least of these are the false images that spread in the first Gulf War, decrying the alleged blowing up of Kuwaiti oil wells by Iraqis under Saddam Hussein. Among the most important was the alleged possession of weapons of mass destruction by the Baghdad regime and its links to Al Qaeda, which President Bush and his allies used as justification for the invasion of Iraq. Or, more recently, there was Putin's Russian government's orchestration of the annexation of the strategic Crimean Peninsula. The litany of fabrications would no doubt be beyond comprehension, especially if its scope were extended to include the spreading minor falsehoods.

As noted at the outset, traditional media sources considered to be of high quality have been guilty of disseminating fakes in an evident failure of all monitoring and verification mechanisms. One memorable instance was the publication of a photograph allegedly attributed to the then president of Venezuela, Hugo Chávez, who was undergoing treatment in Cuba for a cancer described as terminal on the front page of *El País*. It turned out that the image was not of the Bolivarian leader and was not current, forcing the newspaper to publish a retraction with a detailed account of the process prior to its inclusion on the cover page, and to admit to a series of failures in the checks and decisions leading to its publication. In any case, at least the newspaper had the honesty to acknowledge its error, something that is rare in similar or analogous cases of distortions of the

truth.

Recent examples of this type are not limited to the Spanish media or that of any other single country. The United States, for example, recently learned that one of its star reporters, a reporter from one of its most prestigious newspapers, had made up many of his stories in whole or in part, including one that won several prestigious journalism awards. In a similar case, another journalist, also a prominent member of one of the major papers, confessed that the vast majority of the interviews he had published in recent years were exclusively products of his imagination or at best amalgams of others appearing in other publications. Presumably, in these cases as well as in many other similar cases too numerous to list, the system of checks and balances failed, perhaps as the result of an obsession to *get the scoop*, to win exclusivity, and in short, the desire to compete, even at the sacrifice of the basic tenets of professionalism and integrity. However, in the absence of oversight and filters for online content, what obstacles are there to presenting what is untrue as true?

So, fake news has been around forever, the only thing new about it is the change in name. Perhaps it can be explained by the fact that online services and, above all, social networks have made it possible for untruths to multiply rapidly, providing a faster track to public knowledge. What, unfortunately, does not seem to have changed is the ease with which falsehoods earn credibility among the general public. People's propensity to believe any news proffered by the new media players appears to be greater even than that traditionally granted to news published in the press,

heard on the radio or seen on television. Although it is certainly worth asking why, such a forward-looking analysis is beyond the scope of this text, especially since it is not a phenomenon unique to any one place. Spain suffers from it just as much or perhaps less than other countries to which it might be compared. It is interesting to note, however, that several studies have concluded that belief in falsehoods is identical or even greater among people with medium or higher levels of education. The assumption that ignorance or a lack of culture constitutes greater vulnerability for falling into the falsehood trap has rarely been demonstrated and is essentially a recurring piece of fake news with more than a pinch classism, to put it mildly.

However, there are certainly other transformations worth discussing. One very important development is that the centuries-old tradition of the self-serving propagation of hoaxes has been perpetrated by those holding political power, by governments or, in certain cases, by dominant groups in society, but now has spread, establishing a veritable industry that generates falsehoods either by commission or strictly for commercial interest. This is similar to what has always been suspected in the convoluted world of hackers, computer viruses and the other nuisances associated with the online world: what is their relationship or confluence of interest with companies that specialise in creating barriers, firewalls, antiviruses and other security measures for the Internet?

The 1980s was a decade characterised by the expansion of the media landscape – mentioned a few pages earlier – in what came to be known as *investigative journalism*. Although it cannot and

should not be considered rife with falsehoods, the name itself does represent a relatively false description, as it has almost never been what it claims to be. In fact, it consisted primarily of divulging evidence and testimonies of scandalous if not criminal conduct in the more prominent segments of society. There was a little bit of everything, from irregular financing of political parties to corporate clashes, as well as stories more typical of *gossip magazines*. The prevailing theme in almost all of it was the settling of scores, with a tint of personal or corporate revenge, as the underlying foundation for the revelations made to one or more media source. Hence, rather than talking about actual investigation, it is perhaps wiser to refer to *revelatory journalism*. The goal was to make the media, and especially the print media – newspapers and magazines – important players, or perhaps projectile weapons, in disputes of varying substance.

A review of all the cases of this type would be out of place here, but some specific incidents merit attention to gain a better understanding of the phenomenon. One that should be recalled is the Filesa affair, in which opaque contributions were funnelled from different companies into the coffers of the Spanish Socialist Workers' Party (PSOE). It all started with information leaked by the company's accountant shortly after he was abruptly terminated without compensation. It was after that, it is fair to say, that most of the media sources began their investigative work, in open competition with each other to raise the bar for revelations. The case would end up before the courts, and several socialist leaders were convicted at the height of their power. The origin of the Ibercorp scandal was even murkier, as was the course of the successive versions of events and

information in the GAL case. This case surely deserves specific in-depth analysis which, however, is still pending and undoubtedly exceeds the scope of this book. The important thing is that, in these and almost every other account of a scandal, certain and verifiable facts have been mixed with falsehoods that often serve some agenda. Likewise, it is impossible to ignore the number of times – regardless of whether many or few, even once is too many – court transcripts have not matched journalistic accusations, giving rise to the aptly or not so aptly named *court of public opinion*, against which there is often no remedy. Needless to say, the urge to investigate, the impatience to discover and report, has unduly damaged personal reputations, but it has also damaged the reputation of the profession as a whole just as much, if not more.

Over time, it has become clear that a genuine industry has arisen that trades in and alters recordings, photographs, videos and documents, partly, but only partly, emanating from the state's police and intelligence services. The very recent exposure of the role played by retired police chief José Manuel Villarejo, charged with industrial espionage, brings to mind other names, such as Colonel Perote and the notorious Francoist Madrid police inspector, Billy El Niño, as well as agencies like Método 3 and the multinational Kroll. Many of them have been involved, almost never transparently, in a significant proportion of the *investigative journalism* stories.

Even now, it is not easy to determine the true background to the media's involvement in the abundance of scandals. Sometimes the media was used, sometimes it was the instigator, sometimes

it had an agenda… and perhaps sometimes it was manipulated by people betting on the positive outcome of their private wars?

From this point of view, the incidence of *fakes* in the electoral process is probably in need of serious in-depth analysis. Of course, it is far from neutral. Though it might be more relevant to examine a more important fact: the ease with which fakes are generally accepted by society. A great number of people have a pronounced propensity to accept any nonsense as true, affording virtually any source an extraordinary degree of reliability. One very insightful example is that during his eight-year term as president, Barack Obama had to put up with accusations of not having been born in the United States, which would have meant his presidency was unconstitutional. He wound up being forced to produce and circulate his birth certificate, which proved him to be a native of the state of Hawaii. Several subsequent polls during and after his second term showed that a high percentage of Americans, not just Republican voters, remained convinced that his true place of birth was Kenya, the homeland of his biological father, who had immigrated to the United States before his marriage to the former president's mother. The main promoter of the falsehood was none other than his successor in the White House, Donald Trump, who was given high ratings for credibility among the citizenry despite his more than proven propensity to spread all manner of untruths, especially to discredit his opponents.

Like Spain, Europe is also not free of blatant lies that are met with a high degree of acceptance and longevity in society. Producing a list of these would be an insurmountable task, and

moreover, it would be out of date, since not a day passes without more untruths popping up in every possible location. This demonstrates that there are no effective vaccines to prevent this pandemic, which gives rise to several different effects, none of them desirable. One does not have to be an expert to reach the conclusion that the primary asset of any media source is its credibility and, as is often the case with virtues, acquiring it requires perseverance and time. And regardless of the effort taken to gain credibility, all it takes is a single blunder to induce its loss, sometimes irrevocably. This is why it is rather odd how media managers, especially company managers, fail to assess the quality of content – often conveying, even internally, a greater concern for quantity. Fakes often do not so much stem from malicious intent as from the failure to perform the task of reporting. The inability to fact-check due to lack of time, lack of specialisation or lack of sufficient experience can lead – alone, separately, or together – to texts fraught with falsehoods, inaccuracies and, ultimately, misinformation. The abundance of these failings undermines the image of the medium, often irreversibly, while the extent of the deficiency acts to the detriment of the whole sector. Unfortunately, this is something that has not drawn the attention of professional associations, let alone spurred them to act, effectively denying the presumption of corporatism which, as justified as it may be in some aspects, clouds the image of current journalism.

There is a disturbing lack of sensitivity to what is at stake. Nothing will be worse for journalism than citizens acquiring the awareness or the conviction that one, several, or perhaps all media sources are dispensable without plausibly diminishing

levels of knowledge about current affairs. The plurality of options, several of which are free, results in distortions in competition between media outlets that can only be overcome by applying quality standards. In a strictly economic sense, this means providing greater value added than others as a basic attribute for survival. What greater or better value would lead consumers to choose one source over another than offering truthful, reliable and properly contextualised news? Of course, a somewhat cynical reading of the situation could lead one to think that, deep down, more than truthful and quality information, what citizens tend to choose are media sources that provide them with a vision of reality in line with their own convictions. So those who assert that media consumers do not so much seek knowledge of what is happening as to see their own beliefs, presumptions and assumptions about the world confirmed would be right. If confirmed, this would lead to panorama with little or no hope for the future of journalism and news professionals. Is this already the reality? Is it coming?

Full stop... and continuing

Things have changed. No doubt about it. But the future is yet to be written. That much is obvious. The transformations doubtlessly transcend any territorial or social scope by far. But how they are introduced, how the changes translate to everyday reality, differs from one place to another, introducing or subordinating intrinsic particularities of each specific sphere. The situation of the media in Spain is closely linked to technological advancement, but no less so to the professional and managerial profiles active in the real socio-economy. By way of illustration, it is worth mentioning a certain collective disillusionment, as even some of the hopes for greater plurality, freedom and independence raised during the final stretch of the Franco regime and, above all, throughout the Transition, have been dashed. It would not seem an exaggeration to say that its appearance was somewhat fleeting, aborted by the redefinition of the media landscape under the effects of a crisis in the model – especially in the print media – brought about by the emergence of the Internet. For this and other reasons, journalism today is subject to the influence of *non-reporting* groups and interests in which financial institutions, telecommunications companies and sources of funding with unknown intent are active participants. There is no room, therefore, to speak of independence and even less to

speak of plurality, at least in the long term associated with the publisher. It is no less remarkable that the profession of journalism itself has been devalued in general, almost without exception showing a rise in unemployment, underemployment, and, in the least severe cases, precarious employment situations.[32]

Seeking to reflect how the media has navigated the last forty years has been relatively easy. Nor has reflecting on the current reality and the challenges it faces presented great difficulty. The rest, however, has bordered on recklessness, daring to outline the options, alternatives and probabilities about the future that awaits it.

Some certainties are intuitively more solid than others, although there is always room for doubt. Among what can be labelled most conceivable, what perhaps stands out the most is the conviction – or is it simply a desire? – that truthful, analytical, high-quality journalism will survive somewhere. More doubtful is how it will be offered or *consumed*, and even more doubtful is whether it will be practiced with greater or lesser freedom and, consequently, arrive in a *purer* state or be increasingly *contaminating* for society.

The old adage that *information is freedom* threatens to mingle with, and consequently subvert, the related elements of quantity and quality. There is no doubt that today's citizens can potentially access huge amounts of information, much more than

32 *Informe de la Profesión Periodística,* Asociación de la Prensa (different years*),* Madrid.

at any previous time in history, but more does not necessarily mean better. What is more, this overload can easily become a risk of real disinformation.

It might seem inappropriate to many to express fears or concerns about the freedom of information, but they will never be out of place, nor are they now. The socio-political dynamic has likely restricted the public authorities' options for monitoring and intervention. However, supposing that this is true, other threats should not be ignored, especially when some of them are already being intuited or perceived in the current situation.

Unfortunately, the independence of the profession is scarcely or not at all appreciated by those in power. To begin with, the power of media itself, which has long been subject, and frankly subordinate to, owners whose basic interests are not in the field of reporting the news. It has to be acknowledged that for various reasons, information, or at least some of it, or a specific way of transmitting it, is no longer profitable. This has made media sources increasingly dependent on funding from their owners, whether they are willing to admit it or not.

Modern democratic societies have taken to an extreme the paradox of requiring – to some extent demanding – high-quality, truthful and increasingly value-added information, while showing a decreasing willingness to pay for it. The general desire is to get it for free, with the conscious or unconscious abstraction that it is expensive and someone has to pay for it. It would be naïve to think that it is paid for in exchange for nothing, hence the absence among media stakeholders of those interested in returns

other than those potentially resulting from disseminating – if you prefer, marketing – the pure and simple truth.

They may be less mentioned, but the risks are absolutely real, especially if they are weighed against the recurrent attempts at regulation that continue to permeate any kind of political-governmental power. These are claims that, far from disappearing, or precisely because of this, call for a perpetually vigilant attitude on the part of society as a whole as the unequivocal holder of the right to information which is pluralistic, free, and as accurate as possible.