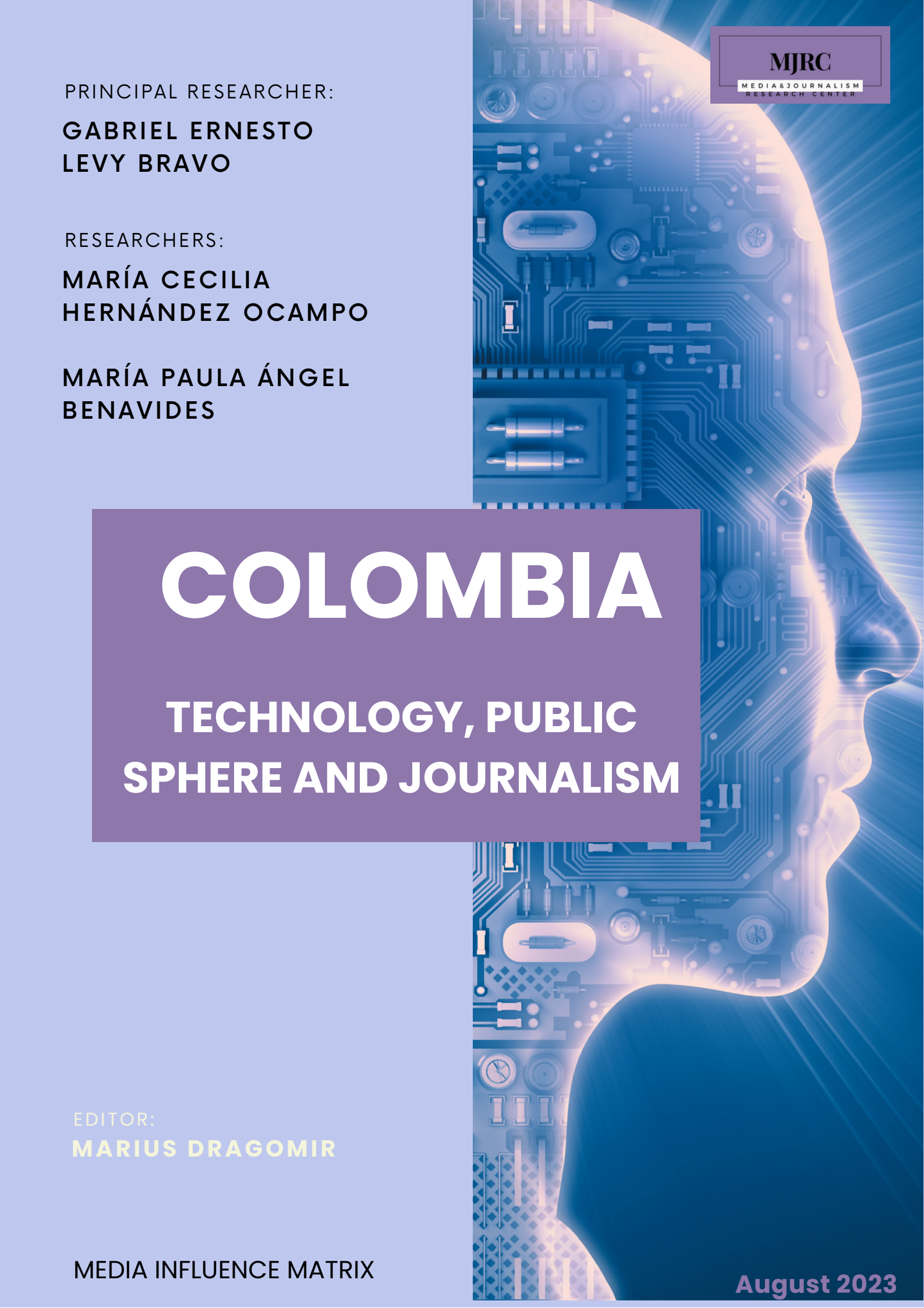PRINCIPAL RESEARCHER:

GABRIEL ERNESTO
LEVY BRAVO

RESEARCHERS:

MARÍA CECILIA
HERNÁNDEZ OCAMPO

MARÍA PAULA ÁNGEL
BENAVIDES

MJRC
MEDIA&JOURNALISM
RESEARCH CENTER

COLOMBIA

TECHNOLOGY, PUBLIC SPHERE AND JOURNALISM

EDITOR:

MARIUS DRAGOMIR

MEDIA INFLUENCE MATRIX

August 2023

Published by

Media and Journalism Research Center (MJRC)
MJRC is an independent media research and policy think tank that seeks to improve the quality of media policymaking and the state of independent media and journalism through research, knowledge sharing and financial support. The center's main areas of research are regulation and policy, media ownership and funding, and the links between tech companies, politics and journalism.

OBSERVACOM
OBSERVACOM (Latin American Observatory of Regulation, Media and Convergence) is a regional think tank specializing in regulation and public policies related to the media, telecommunications, the internet and freedom of expression. OBSERVACOM addresses these issues from a rights perspective, focusing on access, diversity and pluralism. OBSERVACOM brings together experts and researchers committed to the protection and promotion of democracy, cultural diversity, human rights and freedom of expression in Latin America and the Caribbean.

University of Santiago de Compostela (USC)
The University of Santiago de Compostela (USC), founded in 1495, is one of the world's oldest public universities and has two campuses in the cities of Santiago de Compostela and Lugo, in Galicia (Spain). The USC partner in this project is the research group Novos Medios, which is part of the USC's Department of Communication Sciences. Novos Medios specializes in studying the relationship between technology and media, as well as the changes that affect today's journalism in terms of audiences, funding, innovation and public service.

Authors

Gabriel Ernesto Levy Bravo
Lead Researcher

A professional in the field of communications, with a postgraduate degree in digital communication, Levy is an advisor and consultant in ICT, communications, and digital transformation. He is a professor and researcher at the universities of Antioquia and Pontificia Universidad Javeriana, and works as an academic coordinator of Andinalink, one of the most prominent telecommunications fairs in Latin America.

María Cecilia Hernández Ocampo
Researcher

A social communicator and journalist, Hernández has a Master's degree in Communications in Digital Communication from the University of Antioquia (Medellin, Colombia). She has extensive experience in formulating, designing, and implementing 360º communication strategies, as well as editing. Hernández has experience in academic research in social sciences. She is a producer of digital and analog content and has carried out audience analysis and virtual community management. She has studied film and gender and feminism issues.

María Paula Ángel Benavides
Researcher

Ángel has a degree in social communications from the Pontificia Universidad Javeriana (Bogotá, Colombia). She is attending a Master's degree in Communication and Media at the Budapest-based university ELTE with the Stipendium Hungaricum scholarship. Ángel has experience working in media, higher education institutions, and non-governmental organizations.

Editor

Marius Dragomir is the Founding Director of the Media and Journalism Research Center (MJRC). He previously worked as director of the Center for Media, Data and Society at CEU in Budapest. Before, he worked for the Open Society Foundations (OSF) for over a decade where he managed the research and policy portfolio of the Program on Independent Journalism (PIJ), formerly the Network Media Program (NMP), in London. He has also been one of the main editors for PIJ's flagship research and advocacy project, Mapping Digital Media, which covered 56 countries worldwide, and he was the main writer and editor of OSF's Television Across Europe, a comparative study of broadcast policies in 20 European countries.

This is the English adaptation of the Spanish version of **Colombia - Tecnología, esfera Pública y periodismo** published in August 2023.
Author of the English adaptation from Spanish: Norina Solomon

The Media Influence Matrix Project is run collaboratively by the Media & Power Research Consortium, which consists of local as well as regional and international organizations. The consortium members are academic institutions (universities and research centers), NGOs, journalism networks and private foundations.

Table of contents

Technology Overview

Ownership of ICT

In 2021, nearly 38% of the households in Colombia owned a desktop computer, laptop or tablet, according to the National Administrative Department of Statistics (DANE) of Colombia[1]. That figure was higher, at 46.3%, in cities. In contrast, in rural areas, less than 10% of the people owned one of those devices[2]. Laptops are more popular than desktop computers and tablets both nationally (27.5%) and in urban (33.7%) and rural areas (6.8%).

A large portion of the Colombian population uses television, with 89.5% of all households in Colombia owning a television set in 2021. This percentage increases to 93.6% in urban areas but it decreases to 75.7% in rural areas. In villages, conventional color television sets are more prevalent, accounting for 47.9% of ownership. On the other hand, LCD, plasma, or LED televisions have a higher penetration rate in cities, reaching 68.5%.

The television distribution technology also differs from urban to rural areas. In 2021, cable television was the most commonly used nationwide, with a penetration rate of 45.1% of total Colombian households, rising to 56.7% in urban areas. On the other hand, in rural areas, free-to-air television has the highest penetration rate, at 59.5%, followed by satellite television at 10.9%.

The analog signal had the highest penetration among households that reported using free-to-air television both nationally (57.1%) as well as in urban areas (55.3%) and rural areas (60.5%). Free-to-air Digital Terrestrial Television (DTT) was used by 51.3% of the population nationally, 54.6% in urban areas, and 45.1% in rural areas.

[1] DANE. (2022). Survey of Information and Communication Technologies in Households - ENTIC Hogares 2021. Available at: https://www.dane.gov.co/files/investigaciones/boletines/entic/bol_entic_hogares_2021.pdf. The Survey of Information and Communication Technologies in Households (ENTIC Households), developed by the National Administrative Department of Statistics (DANE) of Colombia, is a periodic study that collects data about access and use of ICT by households and individuals in the country, monitoring the trends associated with digital transformation. DANE is recognized as a reliable and professional source of information. The most recent study gathers data for 2021.
[2] DANE. (2022). Survey, *cit.*

In 2021, the national level proportion of individuals aged five and older who owned a cell phone of any type was 76.3%. The regional department of Vichada had the lowest ownership rate at 23.9%, while Bogotá had the highest ownership penetration at 85.3%.

Connectivity

In 2021, 60.5% of all national households in Colombia had an internet connection, with 70.0% of households connected in cities and 28.8% in rural areas. The department with the highest internet penetration in Colombia was the capital city of Bogotá, with 81.5% of households. The department with the lowest penetration was Vichada, with only 4%.

The majority of households have a fixed internet connection, accounting for 78.8%, with a higher proportion in urban areas at 83.2%. In rural areas, the most common type of internet connection is mobile, with a penetration rate of 62.1%. In 2021, 46.3% of households in rural areas used a fixed internet connection[3]. In line with the figures from DANE, the Commission for Communications Regulation (CRC) reported that a total of 8.3 million households in Colombia had fixed internet access in 2022[4].

The highest proportion of households, 37.1%, have a fixed internet connection speed ranging between 2 and 10 megabits per second. That proportion is even higher in rural and dispersed population areas, at 62.3%.The second highest proportion of connection speed range for the national total is between 10 and 30 megabits, which is used by 24.3% of households, followed by the range between 30 and 100 megabits with 19.3%[5].

The highest proportion of households in Colombia (36.9%) pay an average monthly price for fixed internet service in households ranging between COP 50,000 (approximately US$ 10 at the 2021 exchange rate) and COP 80,000 (around US$ 16). Following that, the price range between COP 30,000 (US$ 6) and COP 50,000 (US$ 10) accounts for 26.7%.

[3] DANE. (2022). Survey, *cit.*
[4] POSTDATA is the publisher of sectoral reports that are carried out periodically by the Communications Regulation Commission (CRC), Colombia's media regulator. See more of the POSTDATA database at https://postdata.gov.co/informacion-internet-fijo.
[5] DANE. (2022). Survey, *cit.*

Households without an internet connection in 2021 stated that the main reason for not having one was the cost (48.6% nationwide and 53.8% in urban areas). The second reason was that they did not consider it necessary (23.1% nationwide and 26.9% in urban areas)[6]. In rural areas, cost was the main reason why disconnected households did not buy an internet subscription, with 40.8% of households stating this. However, lack of internet coverage ranked second in importance, with 24.4%.

In the second half of 2022, a total of 76 million Colombians had a mobile phone line, which is equivalent to 138% of the population, according to the CRC. Nearly 38 million Colombians have access to mobile internet, which is approximately 75% of the total population. This figure shows sustained growth over the last decade[7]. In the second half of 2022, some 7.49 million fixed phone lines were in use in Colombia[8].

Use of ICT

In 2021, 31.8% of people in Colombia used a computer, with 37.9% in urban areas and 11.5% in rural areas, according to DANE. The leading departments in terms of computer use were Bogotá D.C. (56.8%), San Andrés (49.2%), and Risaralda (36.7%). In contrast, the departments with the lowest rate of use were Vichada (7.0%), Magdalena (13.9%), and La Guajira (14.8%).

Some 85% of Colombians who use computers know how to copy or move files and folders. The disparity between urban and rural areas is most evident in the use of basic mathematical formulas in a spreadsheet, with a 19.1% higher usage rate in urban areas. This is followed by downloading or installing computer programs, which shows an 18.3% higher usage rate in urban areas, according to DANE.

In 2021, a total of 73.0% of people used the internet anywhere and from any device, with a higher proportion in urban areas (79.8%) and a lower proportion in rural areas (50.5%). Over 72% of Colombians reported using the internet daily, followed by those using it "at least once a week, but not every day" (24.9%), according to data from the DANE study.

---

[6] DANE. (2022). Survey, *cit.*
[7] POSTDATA database, *cit.*
[8] POSTDATA database, *cit.*

The mobile phone is the most commonly used device to access the internet, with 93.9% of Colombians using it. In urban areas, this percentage is 93.8%, while in villages it is 94.4%. Following the mobile phone, the laptop is used by 27.8% of internet users, followed by the smart TV (22.4%) and the desktop computer (21.8%), according to data from DANE.

The devices most commonly used to connect to the internet for work are desktop computers and laptops, with 52.5% and 51.5% respectively. For entertainment purposes, people access the internet via gaming consoles (97.1%), smart TVs (93.5%), and smartphones (67.2%), according to the DANE study. E-book readers were in 2021 the primary device used to access the internet for educational purposes, with 52.3% doing so.

The most common reason for not using the internet is that 31.8% of people lack knowledge about how to use it, followed by unaffordable cost (22.5%), and not needing it (20.5%). The lack of internet connectivity in rural areas is a reason why 16.9% of people in those areas do not use it. In urban areas, only 1% stated that as a reason.

In 2021, 90.9% of people aged five and over used a cell phone, with 93% in urban areas and 83.8% in rural areas, DANE data showed. In 2021, the most common activity on cell phones was personal or family calls (95.5%), followed by entertainment (71.4%), internet browsing (68.4%), and personal or family text messages (67.1%).

According to data from the CRC, approximately 72% of Colombian households consume television through subscription services, 12% of households use DTT, and 13% use aerial analog antennas. Approximately 42% of Colombian households consume video content through OTT platforms, particularly free applications such as YouTube. In 2021, 45.3% of people aged five and over listened to radio signals within the home, with 43.8% in urban areas, and 50.6% in villages. In 2021, 45.3% of people aged five and over listened to radio signals within their homes, with 43.8% in urban areas and 50.6% in villages. The radio is most commonly used for entertainment, both at the national level (91.8%) and in urban areas (92%) and rural areas (91.1%). News and community interest information are sought after more on the radio in rural areas than in larger cities.

Key Players

Overview of the Internet Ecosystem in Colombia

Key players in the Colombian internet ecosystem

Company	Email	Messages and VoIP	Mobile operating system	Search engine	Social media and blogging	Video and photo	Office in Colombia
Alphabet	Gmail	Google chat	Android	Google	Google +	Google Fotos	Bogotá
		Google Meet			Blogger		
Meta	Facebook mail	WhatsApp	None or not relevant	None or not relevant	Facebook	None or not relevant	Bogotá
		Facebook MSN			Instagram		
Microsoft	Outlook	Skype	Windows Mobile	Bing	Windows Photo	None or not relevant	Bogotá
	Hotmail						
Apple	ICloud	I Messenger	IOS	None or not relevant	None or not relevant	ICloud	Bogotá
Huawei	None or not relevant	None or not relevant	Harmoni OS	None or not relevant	None or not relevant	Harmoni OS	Bogotá
Twitter	None or not relevant	Twitter MSG	None or not relevant	None or not relevant	Twitter	None or not relevant	Bogotá

Source: authors • Created with Datawrapper

Use of social media platforms

Some 94% of people aged 16 to 64 use the WhatsApp platform, owned by the Meta conglomerate, closely followed by Facebook, which belongs to the same group, with 91.7%, followed by Instagram, also owned by Meta, with 84.4%. Next comes Tik Tok, owned by ByteDance, a Chinese corporation, with 69.5%, according to data from the latest We Are Social 2022 study for Colombia conducted annually by Keipos, Datareport, and Statista[9].

Use of social media, % of total consumption, in Colombia, 2022

Social media	Owner	%
WhatsApp	Meta	94
Facebook	Meta	92
Instagram	Meta	84
Tik Tok	ByteDance	70

Source: authors' own estimates • Created with Datawrapper

Facebook is the medium with the highest potential reach, reaching 35.15 million users in Colombia. In second place is YouTube, which belongs to the Alphabet conglomerate, with a potential reach of 30.4 million users. In third place, once again, Instagram appears, another company in the Meta group, with a reach of 18.30 million users, and finally TikTok, with a reach of 13.6 million users[10].

---

[9] See more about this study at https://datareportal.com/reports/digital-2022-colombia. The study in 2022 changed its methodology and measurement system, hence a comparison to previous years is not possible. The shares do not indicate cumulative or exclusive forms of use. That means that the same user can potentially consume several or all of the platforms.
[10] See We Are Social 2022, cit., available at https://datareportal.com/reports/digital-2022-colombia.

Nearly all internet users (99.9%) in Colombia use a social network or instant messaging app, and 91.9% of users confirmed that they actively participated in social networks in the last month, with 60.6% doing so for work purposes. On average, users can spend up to three hours and 45 minutes per day using social media. A user can have on average 10 profiles on different social media platforms.

Number of social media users in Colombia, by platform, 2022

Social media	Owner	Number of users
Facebook	Meta	35,150,000
YouTube	Alphabet	30,400,000
Instagram	Meta	18,300,000
TikTok	ByteDance	13,600,000

Source: authors' own estimates • Created with Datawrapper

Use of search engines

Regardless of the hardware technology used, Google, owned by Alphabet, is the most used search engine in Colombia, with a share of 97.19% of the total users who perform internet searches, followed by the search engine Bing, owned by Microsoft, with 1.39%, according to data for the year ending April 2022 from Statcounter. In third place is Yahoo, belonging to the American company of the same name. That shows an extremely high market concentration. In fourth place comes Ecosia, a search engine that operates integrated with Bing and whose philosophy is to donate the revenue to tree planting.

Main search engines used in Colombia, April 2022

Social media	Owner	Share, %
Google	Alphabet	97
Bing	Microsoft	1
Yahoo	Verizon	1
Ecosia	Ecosia	0

Source: Statcounter • Created with Datawrapper

Telecommunications Services

Fixed or home internet services

Since 2006, the operator with the highest number of residential internet users in Colombia is Grupo América Móvil, owned by Mexican telecommunications magnate Carlos Slim. Originally, this company operated under the commercial brand Telmex and later merged its own brands Comcel and Telmex to create the new brand Claro. The company reports a total of 3.1 million users to the Ministry of Information Technologies and Communications[11], practically double the number of subscribers to the second operator, and it concentrates approximately 46% of the fixed connections market[12].

[11] See more at https://colombiatic.mintic.gov.co/679/articles-272793_archivo_pdf.pdf
[12] Disaggregated figures from the Quarterly ICT Bulletin.

The second largest player is UNE-TIGO EPM Telecommunications, a company whose shares belong 49% to the Swedish group Millicom as the state controls the 51% through Empresas Públicas de Medellín. The company reports a total of 1.7 million subscribers, which accounts for approximately 26% of the market. The third-largest operator in the market is Movistar, which belongs to the Spanish group Telefónica, with a total of 1.2 million reported subscribers, accounting for 18% of the market. The fourth largest player is the public operator ETB, which belongs to the city of Bogotá, with a reported 680,000 subscribers, the equivalent of a 10% market share.

At the end of Q2 2022, the main technologies for fixed internet access were cable, with 4.8 million accessing homes; fiber optic, with 2.2 million homes; xDSL, with 0.9 million homes; and other technologies, with around 400,000 fixed internet access points.

The fixed internet access technology that had the highest average download speed in the whole country was optical fiber, with 154.4 Mbps, followed by cable technology with 95.5 Mbps, other technologies with 16.7 Mbps, and xDSL with 5.16 Mbps. The average national download speed for fixed internet access service was 96.5 Mbps for the second quarter of 2022, representing an increase of over 40 Mbps in the last year. For the corporate segment, it was 111.8 Mbps, while for the residential segment, it was 95.3 Mbps.

The highest number of fixed internet access points in the residential segment was found in the download speed range between 128 Mbps and 256 Mbps. In the corporate segment, the highest number of access points was in the range of 64 Mbps and 128 Mbps.

At the end of Q2 2022, Bogotá, D.C., compared to the 32 departments of Colombia, had the highest average download speed in the residential segment, reaching 116.8 Mbps, an increase of more than 40 Mbps in the last year.

During Q2 2022, the provider with the highest operational income in Colombian pesos for the provision of fixed internet access service was Claro with COP 420.2bn (equivalent to some US$ 84m), followed by UNE EPM with COP 382bn (US$ 76m), Movistar with COP 196.7bn (US$ 39m), and ETB with COP 125.9bn (about US$25m).

Among the companies that provide fixed internet access service, 16 suppliers had income equal to or greater than COP 10bn (equivalent to US$ 2m), 35 of them had income between COP 1bn (roughly US$ 200,000) and less than COP 10bn during the second quarter of 2022.

Number of users of fixed internet by operator in Colombia

Fixed internet service	Owner	Number of users
Claro	América Móvil	3,110,000
Tigo	Millicom, EPM	1,770,000
Movistar	Telefónica España	1,230,000
ETB	Bogotá Municipality	680,000
Total	6790000	

Source: authors' own estimates • Created with Datawrapper

Internet mobile services

At the end of Q2 2022, the total number of mobile internet services used in Colombia reached 37.9 million, 4.1 million more than those recorded in the same quarter of the previous year. The four main operators represent 95% of the total market, with 35.9 million active subscribers.

Just like on the fixed internet market, the operator with the dominant position in the mobile segment is América Móvil Group (Claro), which has a total of 20 million users, equivalent to a 56% share of mobile use market. The second largest player by use of mobile internet is the Telefónica Group with its brand Movistar, with a total of 8.7 million subscribers to the mobile service, corresponding to 24% of the market. It is followed by the Sweden-owned company Millicom with its brand TIGO, which has a total of 6.5 million mobile users, equivalent to 18% of the market, and WOM, belonging to the multinational international investment fund Novator Partners, with an approximate total of 700,000 subscribers, which represent 2% of the market.

The number of mobile internet users per 100 inhabitants stood at 73.5 in the country at the end of the second quarter of 2022. During Q2 2022, the provider with the highest revenue in Colombian pesos, excluding taxes, from the provision of mobile internet access service, was Claro with COP 1.283tn (equivalent to US$ 256m), followed by TIGO with COP 383bn (US$ 76m), and WOM with COP 62bn (US$ 12m).

Number of mobile internet users by operator in Colombia

Internet mobile service	Owner	Number of users
Claro	América Móvil	20,000,000
Movistar	Telefónica España	8,700,000
Tigo	Millicom, EPM	6,500,000
WOM	Novator Partners	700,000
Total	35900000	

Source: authors' own estimates • Created with Datawrapper

Technology, Government and Journalism

Colombia does not have specific regulations for digital media. Although there have been various initiatives in parliament in this regard[13], none of them have matured into law, in most cases due to their inapplicability or because they go against international agreements and basic principles of neutrality. Scarcely regulated topics online include child protection, copyright, and categorization of the internet as a public service[14]. The CRC does not have sufficient legal tools to exercise regulation in many of the areas and fields of the internet, which is why many sensitive topics are still unregulated.

Tensions on the advertising market

Just like in many other countries around the world, the greatest tension in recent years between the media, journalists, and the big platforms has revolved around the issue of advertising revenue, as the growth that these big platforms, especially Alphabet and Meta, have had in this market has come at the expense of the media; these platforms have benefited from the original content that media outlets produce without offering any compensation to offset the use and exploitation of this information[15].

[13] Dilmar Villena, "Proyecto de ley pretende regular las redes sociales sin entender cómo funciona Internet" (The bill aims to regulate social media without understanding how the internet works), *Hiperderecho*, 2 March 2021, https://hiperderecho.org/2021/03/proyecto-de-ley-pretende-regular-las-redes-sociales-sin-entender-como-funciona-internet/

[14] See more at "Ley de internet como servicio público esencial y universal" (The law on internet as an essential and universal public service), Brigard Urrutia, 11 August 2021, https://bu.com.co/es/insights/noticias/ley-de-internet-como-servicio-publico-esencial-y-universal#:~:text=La%20Ley%20202108%20de%2029,de%20car%C3%A1cter%20esencial%20en%20Colombia.

[15] "Facebook y Google pagarían a los medios por el uso de sus contenidos en Canadá" (Facebook and Google would pay the media for the use of their content in Canada), *El Espectador*, 6 April 2022, https://www.elespectador.com/economia/facebook-y-google-pagarian-a-los-medios-por-el-uso-de-sus-contenidos-en-canada/.

The progress in negotiations achieved in Australia and Europe between the media and the big platforms has not been foreign to the Colombian reality where the media have requested a similar treatment from these big corporations[16].

All this pressure led to Google finally accepting, in 2021, after the great crisis caused by the Covid-19 pandemic, to include the News Showcase program of licensing and content curation, in which participating media outlets began receiving a fixed monthly fee for the curation of their articles[17]. The agreement was reached with 24 media outlets throughout the country, including local, regional and nationwide outlets that belong to the national media associations Association of News Media (AMI) and Asomedios. It was the first market in the world to include radio outlets in the initiative, in addition to newspapers, magazines, and television networks.

Colombia was the third country in Latin America to get access to the Google News Showcase after Argentina and Brazil and other countries around the world such as the United Kingdom, Italy, Germany, India, and Austria. The program is used by close to 1,000 publications globally.

Google pays a monthly fee for the content produced and curated that appears on the News Showcase panels while maintaining complete control over its brand presence. Each article that appears on these panels sends the reader directly to the website of each media outlet, allowing them to access paid content, which can persuade them to consider a future subscription.

[16] "El dilema de Facebook y Google: pagar por noticias o ayudar a medios" (The dilemma of Facebook and Google: pay for news or help the media), *Portafolio*, 25 February 2021, https://www.portafolio.co/economia/el-dilema-de-facebook-y-google-pagar-por-noticias-o-ayudar-a-los-medios-549486
[17] Daniela Morales Soler, "News Showcase, programa de Google llega a Colombia tras alianzas con medios" (News Showcase, the Google program arrives in Colombia after alliances with the media), *La República*, 25 August 2021, https://www.larepublica.co/empresas/programa-de-google-news-showcase-llega-a-colombia-tras-alianzas-con-medios-3222417

Media outlets that signed up for Google News Showcase

BLU Radio	El Nuevo Siglo
Caracol Radio	El País
El Colombiano	El Pilón
El Diario,	El Universal
El Tiempo	Hoy Diario del Magdalena
Canal 1	La Crónica del Quindío
El Espectador	La Opinión
El Heraldo	La Patria
El Nuevo Dia	Publimetro
Noticias Caracol	Q´hubo Bogotá
Q'hubo Bucaramanga	Q'hubo Cali
Q'hubo Medellín	Semana
Vanguardia	W Radio

Source: authors • Created with Datawrapper

Disinformation

As in many other countries around the world, the phenomenon of disinformation in Colombia affects credibility and the social fabric, and disrupts the social dynamics.

According to the University of Los Andes[18], during the first year of the Covid-19 pandemic, false news regarding Covid-19, vaccines, and public health policies were spread through various channels such as social media and instant messaging applications.

In the Global Disinformation Index (GDI), Colombian media obtained a rating of 58 out of 100. After reviewing news websites, GDI's experts found that only one of them is classified as "minimal risk", 14 as "low risk", 15 as "medium risk", and four sites fell into the category of "high risk" in terms of disinformation risk, out of 34 media analyzed[19]. In the same study, the majority of the sites (44%) are classified as medium risk, and 41% of the sites are classified as low risk. Some 12% of them present a high risk of disinformation.

The overall ratings of the media are usually reduced due to operational problems, especially lack of transparency about the ownership and financing structure of a site, as well as other operational and editorial policies such as source attribution guidelines and fact-checking practices.

Social networks are a breeding ground for the growth of disinformation. A study from the University of Oxford placed Colombia among the 70 countries where organized manipulation of campaigns on social networks is evident[20]. A survey conducted by the Political Communication Research Group of the Faculty of Social Communication-Journalism at the Externado University of Colombia found that 34% of Colombians perceive WhatsApp to have a significant responsibility in the spread of fake news.

One of the most important initiatives aimed at combating disinformation that have been implemented in Colombia is ColombiaCheck, a project of the non-profit organization Consejo de Redacción, a non-partisan group that brings together over 100 journalists in Colombia to promote investigative journalism. The project consists of a digital, open and collaborative platform in which articles based on fact-checking are published[21].

[18] See more at https://colev.uniandes.edu.co/2-uncategorised/55-un-anio-de-desinformacion.
[19] See more on this index at https://www.disinformationindex.org/country-studies/2022-11-29-disinformation-risk-assessment-the-online-news-market-in-colombia/?utm_source=gdip&utm_medium=direct&utm_campaign=colombiaMMR22
[20] Samantha Bradshaw, Phil Howard, "El orden global de la desinformación. Inventario global de la manipulación organizada en redes sociales 2019", University of Oxford, 2019, https://www.apoyocomunicacion.com/repositorio/boletin/periodistas/2019/Orden-Global-OXFORD.pdf
[21] See more information about this initiative at https://colombiacheck.com/sobre-nosotros.

Conclusions

Although the figures for access and use of ICT have gradually improved in Colombia, the situation is far from optimal. The same goes for connectivity. The most concerning aspect overall is the difference between urban centers and rural areas. The gap is significant and seems to be far from closing, despite the efforts made by the government and other actors to narrow this gap. Geographic, social, and economic barriers continue to be difficult to tackle.

In 2021, the percentage of households nationwide that owned some type of television was 89.5%. As for the infrastructure to receive television services, the figures varied depending on the area. For example, cable television was the most used in municipal capitals, while free-to-air television was most used in rural areas. The same year, the percentage of households that owned a desktop computer, laptop, or tablet was 37.9%, and the percentage of people who had a cell phone of any type was 76.3%. As for connectivity, 60.5% of the total national households had fixed internet connection, with a higher proportion in large cities. In rural areas, mobile connection, which 75% of the total population have access to, is more popular. As for fixed Internet operators, the market is dominated by Claro, followed by Tigo and Movistar. Regarding mobile internet suppliers, the market is also dominated by Claro, followed by Movistar and Tigo.

Among internet users, the device most used to get online access is the cell phone with 93.9%. WhatsApp is the most popular social media platform with 94% of internet users, followed very closely by Facebook with 91.7% and Instagram with 84.4%, all belonging to the Meta conglomerate. Google leads in the search engine market with more than 97% of all users who performed searches on the internet. Thus, although the internet seems to be a diverse market, the truth is that it is not so.

On the other hand, although the country is more connected than ever before and citizens have more options to consume information, the media do not have it easy. Apart from tensions over advertising revenue, which have been exacerbated by the growing power of conglomerates like Meta and Google, they face more competition and, in many ways, more obstacles than before. Successfully overcoming those challenges is key and depends on their ability to stay afloat economically and to earn or regain the public's trust, especially in times when disinformation and fake news are everyday realities.

More about the project Media Influence Matrix at
http://journalismresearch.org

Media and Journalism Research Center

Postal address:
6 South Molton St,
London, W1K 5QF, UK
mjrc@journalismresearch.org
www.journalismresearch.org