

From a few hands to less. Media concentration in Costa Rica between 1990-2017

De pocas a menos manos. La concentración de medios en Costa Rica entre 1990-2017

De poucas a menos mãos. A concentração da mídia na Costa Rica entre os anos 1990-2017

ÓSCAR JIMÉNEZ, Universidad de Costa Rica, San José, Costa Rica (oscardariojimenez@gmail.com)

KOEN VOOREND, Instituto de Investigaciones Sociales y Escuela de Ciencias de la Comunicación Colectiva de la Universidad de Costa Rica, San José, Costa Rica (koen.voorend@ucr.ac.cr)

ABSTRACT

In this paper we analyze the concentration of media ownership in Costa Rica. To measure economic concentration, we applied the Herfindahl-Hirschman index to the ownership of radio and open television, using data from the radio frequency concession contracts (radio and television) which show that the actual concentration of media is higher than what the formal ownership data suggests. In addition, through an analysis of the recent historic evolution of media concentration in Costa Rica (1990-2017), we show that concentration levels have intensified over the last three decades.

Keywords: mass media; media concentration; diversity; radio; televisión; Costa Rica.

RESUMEN

En este artículo analizamos la concentración de la propiedad de los medios en Costa Rica. Para medir la concentración económica, aplicamos el índice Herfindahl-Hirschman a la propiedad de radio y televisión abierta, utilizando datos de los contratos de concesión de frecuencias radioeléctricas (radio y TV), que muestran que la concentración real de los medios es más alta de lo que sugieren los datos de la propiedad formal. Además, mediante un análisis de la evolución histórica contemporánea de la concentración de medios en Costa Rica (1990-2017) demostramos que los niveles de concentración se intensificaron durante las últimas tres décadas.

Palabras clave: medios de comunicación; concentración; pluralidad; radio; televisión; Costa Rica.

RESUMO

Neste artigo analisamos a concentração da propriedade dos meios em Costa Rica. Para medir a concentração econômica, aplicamos o índice Herfindahl-Hirschman à propriedade de rádio e televisão aberta, usando dados dos contratos de concessão de frequências radioelétrica (rádio e TV), que mostram que a concentração real dos meios é mais alta do que sugerem os dados da propriedade formal. Além disso, através de uma análise da evolução histórica contemporânea da concentração de meios em Costa Rica (1990-2017) demonstramos que os níveis de concentração se intensificaram durante as últimas três décadas.

Palavras-chave: meios de comunicação; concentração; pluralidade; rádio; televisão; Costa Rica.

How to cite:

Jiménez, O. & Voorend, K. (2019). De pocas a menos manos. La concentración de medios en Costa Rica entre 1990-2017. *Cuadernos.info*, (45), 191-210. <https://doi.org/10.7764/cdi.45.1553>

INTRODUCTION

There is a fierce public debate in Costa Rica on citizen's right to information and freedom of expression and, as a result, there is a special concern for the ownership of the media and its levels of concentration. This concern arises not only because of the main role of the media as a source of information (CIEP, 2016, 2018; Jiménez, 2018), but also because its concentration in few hands causes the reduction of the voices present in national debates and consolidates public scenarios that are not very representative of our societies (Botero, 2010; Hallin & Mancini, 2007; MacBride, 1987; Mattelart, 1998). This debate about the media and its property is the framework for this work.

This research is based on the general premise that, in Costa Rica, ownership of the media system is concentrated among a few actors (Fournier, Jiménez, & Ochoa, 2018; Jiménez, 2018; Pomareda, 2016; Robles & Voorend, 2011). However, it is not clear exactly how concentrated it is, let alone what has been its evolution in recent years. This work speaks to these two areas to inform public debate, proposing a quantitative measurement of the concentration in radio and television and investigating the trends of its contemporary historical evolution for the period 1990- 2017¹.

Methodologically, the decision to focus on radio and television is justified for three reasons. First, because they continue to be the media preferred by the Costa Rican population: 88% of Costa Ricans use television to inform themselves (CIEP, 2018), while radio continues to occupy an important place of preference, despite its decrease in audience (CIEP, 2017, 2018). Second, these media are in a process of digitalization of their broadcasts, thus sharing a process of technological change in full force. Furthermore, currently both are regulated by the Radio and Television Law. Third, in contrast to the printed and digital press, these media have public records that allow for the calculation of concentration levels with a historical perspective.

The contribution of our work is methodological and empirical, since we apply a novel quantitative methodology for measuring property concentration. This methodology is subject to updating in subsequent works that use the same elements of analysis and research. With this, we intend to insert ourselves not only in a public debate in Costa Rica, but also in a regional debate about the negative consequences of high concentration for diversity and pluralism (Becerra, 2014, 2015; Herscovici, Bolaño, & Mastrini,

1999; Labate, Lozano, Marino, Mestrino, & Becerra, 2013), crucial elements for contemporary societies to guarantee communication rights (Becerra & Mastrini, 2006a; 2009; Beltrán, 2014).

In what follows, we provide a brief systematization of some theoretical postulates that form the basis of our discussion. Then, we present the context of the Costa Rican media system. The fourth section explains the process of data collection and processing and the methodology applied to measure the concentration. Subsequently, we explain the empirical analysis of the concentration of property. The last section offers some final thoughts based on the findings.

THEORETICAL FRAMEWORK

ON CONCENTRATION AND ITS NEGATIVE EFFECTS FOR PLURALISM

The concentration of property in the media is a problem related to pluralism, democracy and the diversity of radio and television contents. Conceptually, the concentration of property is understood as the accumulation by few actors of a specific media market and other related activities (Mendel, García-Castillejo, & Gómez, 2017). The concentration can be considered a process (from a number of owners to a smaller number of owners) and a result (ownership in very few hands), or both. This hoarding of the media by few actors causes an increase in power of fewer actors in the media system, which puts those actors that accumulate broadcasting signals in an advantageous competitive position regarding others (Jiménez, 2018).

There are several classic forms of concentration of ownership in the media. First, horizontal concentration, which occurs when the same actor in a specific media market simultaneously manages different media. Second, vertical or integral concentration, when an actor from a specific media market seeks to expand in different phases of production in the same media (Labate et al., 2013). This type of concentration becomes more clearly visible when a television company buys, for example, an independent production company. Thus, not only it begins to control the space where a signal is broadcasted (the channel or radio station), but also the space where the content that transmits that signal is produced (Labate et al., 2013). Third, there is diagonal or conglomerate concentration, which occurs when an actor in a given media market ventures into other areas of the economy, other than communication. That is, processes of property concentration that consider both

the investments of a specific actor in the media area and those made in any other economic area. This type of concentration boomed with the settlement of neoliberal reformism (Mengo, 2010; Zallo, 1988, 1992, 2011).

New forms of concentration are added to these classical ones, such as multimedia integration or international concentration (Labate et al., 2013; Pérez, 2002; Zallo, 1992). However, this work focuses on the study of horizontal concentration. That is, it focuses its attention on the analysis of the accumulation of media of a certain type by the actors of the Costa Rican media ecosystem.

This analysis is relevant due to the relationship between concentration and pluralism, diversity of content and, finally, democracy. The basic premise is that the concentration of media ownership in few hands implies a decrease in the plurality of voices represented by these media, homogenizing content and limiting the possibilities of people to access an open and plural communication (Botero, 2010). Thus, eventually, media concentration constitutes a threat to contemporary democracies (Botero, 2010; Lanza, 2014), because citizen's right to information and freedom of expression are not fully guaranteed.

Concentration damages the full exercise of citizenship and erodes people's right to information (Martín-Barbero, 2005; McChesney, 2005). In highly mediatised societies with strong media penetration, such as in the Costa Rican (CIEP, 2014, 2015, 2016), this practice harms the so-called *right to have a voice* of the various sectors that constitute societies (Botero, 2010), since they exclude them from public debate, preventing their proposals and ideas from reaching the social group.

This concern is crystallized in various pronouncements of international organizations, which refer to the negative consequences of concentration. They have pointed out that the concentration of radio frequencies and media is a violation of people's right to freedom of expression and harms the strengthening of democracy (Lanza, 2014). In addition, they have expressed that concentration is a threat to the diversity of the media, as well as a practice that undermines the diversity of sources and opinions (OEA, 2007). Consequently, they explicitly urge States to take measures to avoid monopolies and oligopolies that concentrate the media and to prevent the hoarding of the radio spectrum frequencies by a few. Both the OAS and the UN have argued for robust standards in broadcasting that consider the negative consequences of monopolistic

practices and guarantee equal media access to everyone (Botero, 2010, 2013).

It is important to mention that the increase in content consumption through digital platforms does not necessarily diminish this exclusion, since these new media are complementary to the traditional ones. That is, citizens continue to monitor the public agenda by traditional means such as television, but now they also use social networks, Internet or text messaging systems. As mentioned, in Costa Rica 88% of people continue to be informed through open-TV (CIEP, 2016).

Nevertheless, this does not mean that the dynamics in contemporary media ecosystems have remained unchanged compared to a few decades ago. It is true that the media continue to play a relevant role in the formation of public opinion, as McCombs (1996) put it in his theory of the agenda setting. However, it is also true that the dynamics have become more complex due to the hyper-saturated context of information in which we live. In that regard, media concentration is relevant but insufficient to explain dynamics related to pluralism (Carazo, 2018). Despite this, its study continues to be vital from the perspective of freedom of expression.

It is relevant to point out that in this paper, the analysis takes an explicit critical position towards concentration, considering it as a negative process and result that diminishes pluralism and diversity, and that conspires openly against citizen's communication rights. To contribute to the aforementioned debates, this paper studies the evolution of the horizontal property concentration in the radio and television media of Costa Rica. That is, it analyzes the evolution of the accumulation of radio frequencies by the different economic groups or communication companies that are part of this country's media system. Before entering the empirical analysis, we offer a brief contextualization of the Costa Rican media system.

THE CONTEXT OF THE MEDIA SYSTEM AFTER NEOLIBERAL REFORMISM IN COSTA RICA

Like almost all media systems in the world, the Costa Rican has a presence of written, native digital, radio, open-access television and pay-TV media. This research focuses on open access radio and television, which are those that need the radio spectrum to be able to transmit their signal. These two types of media are what make up the so-called open-access broadcast.

In order to enter this broadcasting market in Costa Rica it is necessary to have a concession contract

for the radio spectrum. This contractual document is signed by the State and by the concessionaire of the frequency, which undertakes to meet a series of minimum requirements regarding coverage, signal quality and broadcasting channels. This contract is the only legal gateway for an actor –private, public or State– to the open broadcast media system. Therefore, its administration actually becomes, in one way or another, a key factor when studying media ownership.

In legal terms, open-access radio and television broadcasting is governed by a framework where two laws coexist. According to Chinchilla (2013) this creates a mixed regulatory framework with a complementary character consisting of 1) Radio Law No. 1758 passed in 1954, in the first instance, and 2) General Telecommunications Law No. 8642 and its regulations, approved in 2008 as part of a package of bills promoted after the approval of the Free Trade Agreement between the United States, Central America and the Dominican Republic (CGR, 2013; PGRCR, 2013).

According to the Office of the General Attorney of the Republic of Costa Rica (PGRCR, 2013), this regulatory framework is divided thematically. Broadcasting services are regulated by the Radio Law regarding the granting of concessions and the provision of radio and television service, while the General Telecommunications Law is used for aspects related to planning, administration and control of the radio spectrum.

Civil society, academia and public institutions have argued that this legal framework has shortcomings and omissions and does not adequately regulate the object on which it intends to legislate (CGR, 2012; PGRCR, 2013, 2016; UCR, 2010). Criticisms indicate that the Radio Law does not respond to the current needs of radio and television, and that it does not meet the constitutional requirements of public property (PGRCR, 2013). For example, it does not recognize the existence of community media or establish a frequency reserved for social or public media. In addition, it does not contain any type of property limitation, nor does it stipulate any type of measure to promote media pluralism. The law does not establish a clear procedure that allows differentiated access to the spectrum of non-commercial actors nor does it consider democratic mechanisms that allow the State to recover disused frequencies.

It is important to mention that this normative framework went through a profound change at the end of the 20th century, in line with the economic and productive transformations that occurred in the 1980s

and 1990s. These transformations occurred due to the insertion of Costa Rica in neoliberal globalization, which included, in part, the impulse to commercial liberalization, the reduction of tariff protections, the promotion of exports, the reform of the financial system and the labour system, the privatization of the public business sector and the weakening of State capacities (Hidalgo Capitán, 1998, 2000).

Although the application and insertion of neoliberal globalization in Costa Rica has been heterodox and slow due to the State-centric matrix that persists in the population (Raventós, 2018), the truth is that it impacted the media system of this country. The media, its ecosystem, its actors and regulatory frameworks have changed and consolidated a media scenario with a clear tendency to deregulate, liberalize and concentrate property. The modifications to the regulatory framework were promoted by different executive, legislative and even judicial instances, and affected laws, regulations and regulatory provisions regarding communication (Jiménez, 2018).

For example, in 1994, the Constitutional Chamber issued vote No. 5965-1994 against Law 6220, which allowed the entry of international multimedia actors, companies and conglomerates into the Costa Rican broadcasting system. Specifically, this eliminated an article that established that the media could only be exploited by Costa Ricans by birth, by children of Costa Ricans or by naturalized persons with no less than 10 years of residence in the country, after having acquired nationality. After the elimination of said regulation, the Repretel Group and the Salinas Group, owner of Televisión Azteca de México, began to invest in Costa Rica, which marked the beginning of the process of transnationalization of communication that remains until today (Fournier et al., 2018).

Another example of these changes is the legislative approval of the General Telecommunications Law (LGT) in 2008, which profoundly modified the regulatory framework for broadcasting. This approved regulation abrogated a series of articles and provisions contained in the Radio Law, created a new telecommunications infrastructure and facilitated a fundamentally commercial and liberal media system (Cruz, 2014; Padilla, 2015; UCR, 2010; Amador, 2009).

Thus, in a general context of neoliberal reformism in political and economic matters, a media system of a mostly private nature was consolidated, with a predominance of commercial actors, liberalized and poorly regulated (Jiménez, 2018). Since the 1990s, there is a scenario in

Costa Rica in which the mergers, purchases and sales of television and radio stations did not find many obstacles, either from the point of view of Human Rights or from competition or monopolistic practices.

Parallel to this normative transformation, the Costa Rican media system was also affected by a global trend: the crisis of the commercial communication business model, which implied a decrease in the advertising pattern, an increase in new consumer platforms and an increase in the connectivity of Internet services. All this, in turn, modified the habits of media consumption and caused an augmentation in the use and dissemination of information through new platforms, social networks and the Internet (Jiménez, 2018; CIEP, 2017, 2018). In the case of Costa Rica, more than a shift in consumers' preferences, there has been a complementarity between new media and traditional electronic media (CIEP, 2018). Although there are changes in consumption, Costa Rican audiences continue to turn on the television and other traditional media, which reaffirms the relevance of studying them systematically.

Despite this complementarity in terms of consumption, Costa Rican media have felt the effects of this new context. In recent years, at least three economic communication groups have merged their newsrooms in order to reduce production costs and adapt to the new digital environment (Jiménez, 2018; Fournier et al., 2018). Likewise, several groups have closed their media outlets and there have been made massive layoffs in search of market profitability (Méndez, Rojas, & Herrera, 2015). The Nación Group, the Repretel Group and the Extra Group are emblematic media actors of this trend. Since 2011, the Nación Group has closed five media outlets, has fired approximately 600 people, and has diversified its investments in search of new income to solve the loss generated by the low sale of advertising (Grupo Nación, 2009, 2010, 2011, 2012, 2013, 2014). On the other hand, the Repretel Group has also conducted mass layoffs and has merged the newsrooms of its three media that have information services (López & Herrera, 2016; Repretel, 2016). In the same vein, the Extra Group stopped printing the newspaper *La Prensa Libre* to convert it into a digital one (Teletica, 2014).

This global and normative context has allowed the different actors of Costa Rican communication to develop different strategies that tend to favor the concentration of property. Jiménez (2018) identifies different practices in this regard. Among them, joint ventures, business alliances between concessionaires,

the full rental of concessionary companies, concession assignments, transfers or sales of shares between legal companies, and merger concentration. These political-business and judicial dynamics have been facilitated thanks to the ignored and outdated legal context that, as mentioned, does not present strict regulations on concentration and is inserted into global dynamics of generalized liberalization.

Therefore, it is not surprising that media concentration in Costa Rica is an issue that attracts the attention of the academia. Several recent works have pointed out, in a consistent manner and with empirical data, how the concentration damages citizens' rights in terms of communication and fosters less pluralistic scenarios for public debate (Boza, 2015; Fournier et al., 2018; Pomareda, 2016; Presentan la ley..., 2015; Robles & Voorend, 2011). Institutional reports and regional papers that study the concentration of media and telecommunications in Costa Rica have also shown inconsistencies in the regulatory framework that currently regulates broadcasting (CGR, 2012; PGRCR, 2013, 2016; SUTEL, 2012, 2013, 2014, 2015a, 2015b), while others have generated a series of relevant data on telecommunications and media (Becerra & Mastrini, 2009; Rockwell & Janus, 2003).

This work aims to complement this research by providing quantitative data on the concentration in radio and television media. This data allows a deeper discussion about the problem of power structures in the media, the concentration of property and the implications of these issues for democracy. It also allows to identify more clearly the practical consequences of the concentration in the legal, global and cultural sphere in which the media studied here are inserted.

METHODOLOGY

This work seeks to measure the evolution of media concentration in the period 1990-2017. To do so, we collected data on the horizontal concentration of property on radio and television from 1989 to 2017, following Jiménez (2018). Specifically, we used the official records of the broadcasting radio frequency spectrum concessionaires. These files consist of 187 radio spectrum concession contracts signed between concessionaires and the State, as well as letters, documents, emails and exchanges between these two actors for almost three decades. These documents reflect the history of Costa Rican broadcasting, as well as its main actors, economic groups and problems.

To gather this information, a first step involved a thorough systematization of concessionaries' records. First, we conducted a reading of all the documentation to identify the relevant information for the purposes of the study. Second, from the official documentation, we built two databases on frequency concessionaries of the two selected media.

The first database contains the details of the formal concessionaries by year of signature. That is, we recorded which legal person signed a contract with the State to exploit a certain frequency. In the second database we reported which communication group actually exploited that frequency. That is, beyond the official documentation, which economic group had real control over the frequency. The existence of this second database lies in the fact that current regulations allow for a formal representation other than the communication group that operates a certain frequency. In other words, it is based on a suspicion that there is a difference between the formal administrator of the radio stations or the channels (who signs the concession contract) and the real administrator (who effectively exploits the concession).

Regarding the selection of the period, we used the criteria of availability of comparable information over the years for the two databases. From 1990 onwards, there is enough information to be able to provide a complete panorama of the Costa Rican media scene with a contemporary historical perspective.

Based on these data, we applied the concentration measure known as the Herfindahl-Hirschman Index (HHI). This index is widely accepted (Huerta-Wong & Gómez, 2013; Becerra & Mastrini, 2006a, 2009; Mengo, 2010; Ortega, 2012; Sánchez-Taberner, 1993; Trejo, 2010) and was used to measure empirically and quantitatively the concentration levels in the holding of concession contracts for broadcasting.

In general terms, the HHI states that the concentration can be measured by squaring the market share of each firm competing in a market and then adding up the resulting numbers; the higher the index, the less competitive the market. In other words, it is the sum of the fraction of the squared market of the N companies that compose it, as represented in the following equation:

$$H = \sum_{i=1}^n S_i^2$$

Where:

n = Number of companies in the industry.

S_i = Percentage of participation of each company in the market.

In this work, *market share* (S_i) is the percentage of concession contracts that a given person or economic group had with respect to the total number of frequencies concessions for each year. That is, the formula was applied per year, considering the amount of concession contracts that each actor had at that time, as well as all the concessions granted by then. In doing so, we obtained a specific concentration data for each year, both for formal administrators (database 1) and for real administrators (database 2).

For the interpretation of the index, concentration is measured in a range between 0 and 1; the closer to 1 the result is, the more concentrated that market will be, and the closer to 0, the less concentrated. However, this result does not provide enough information to determine whether a market is concentrated or not, since each media scenario has its own characteristics. It is necessary, therefore, to have some criteria to affirm whether a result implies high or low concentration.

Therefore, this work used parameters and ranges suggested by the Telecommunications Superintendence (SUTEL, 2013). SUTEL, as a State telecommunications regulatory body, recommended using the HHI to measure the concentration in the broadcasting market (SUTEL, 2013) and suggests ranges of results to identify whether or not there are indications of spectrum concentration: $0.1 \geq \text{HHI} = \text{low}$; $0.1 < \text{HHI} \leq 0.18 = \text{median}$; $\text{HHI} > 0.18 = \text{high}$.

In practical terms, for each of the media we made a total of 54 concentration calculations, corresponding to the 27 calculations made on the basis of the actual administrators for each year between 1990 and 2017, and to the 27 made on the basis of the formal administrators. In total, we performed 162 concentration calculations: 54 for AM radio, 54 for FM radio and 54 for open-TV, which were systematized in three graphs.

Each of these graphs allows to see the evolution of the property concentration index during the studied period, both of formal concessionaires and of the economic communication groups that actually manage each frequency. This historical evolution allows to analyze trends and continuities, and identify moments of increase and decrease of the levels of media concentration, which are analyzed and interpreted in detail in the presentation of results. This exercise is a relevant methodological contribution, since to date there is no other historical approach to the property concentration in Costa Rica that uses the radio spectrum concession contracts.

Additionally, in the case of open-TV, we also analyzed the audience concentration. That is, the HHI was applied

to the audience data, using data from the General Media Study (EGM) and following Jiménez (2018). These data do not allow a historical perspective approach, but they help clarify the results in terms of ownership.

This cross-reference with the audience concentration data allows to have more clarity about the relative weight of the communication groups and their power and incidence within the general media landscape. For example, there may be a communication group with many frequencies, but little audience. Or, on the contrary, one single media outlet may concentrate more than half of the audience, and thus has more power and impact.

RESULTS

FROM A FEW HANDS TO LESS: THE HISTORICAL EVOLUTION OF MEDIA CONCENTRATION IN COSTA RICA

The empirical data presented here provide evidence that open-access broadcasting in Costa Rica has had, at least during the past 30 years, a clear trend towards concentration. That is, the number of actors who have access to the property of a media outlet has been decreasing, as shown below.

This increase in concentration from a historical perspective has resulted in a contemporary media scenario with little plurality, with a notorious absence of voices of different types and with few companies simultaneously controlling several radio and television signals. At a first glance, the result of the HHI might seem low and unproblematic. However, if the analysis is qualified by type of medium, type of band or frequency, or factors such as audiences or the sale of advertising are added, the conclusion is that there is a concentration that affects media democracy. While this article does not focus on these additional factors, some of them are added in this section to enrich the analysis.

Radio

In both the amplitude modulation radio (AM radio) and the frequency modulation radio (FM radio), the concentration study shows a clear upward trend that remains constant in the period 1990-2017. The reasons that explain this trend are very similar for both.

It is evident that there is, as expected, a substantial difference between the index applied to frequency concession contracts, i.e., formal property and the measurement applied to groups, i.e., real property (figure 1). Due to space limitations, in this work we

focus on the results by economic group (real property), since it is a more accurate radiography of the media scenario than the measurement by formal concession contracts (Jiménez, 2018).

In a first reading, the parameters of SUTEL would suggest that the result of the HHI in radio is low. However, in its report on concentration, SUTEL also provided other factors that allow further analysis. For example, the regulatory body estimated that if an economic group owns more than four FM stations and more than five AM ones, it would be a possible indication of ownership concentration (SUTEL, 2013). Therefore, SUTEL already warned that there is currently a substantial concentration of ownership on the radio. More importantly, there is a trend towards more concentration as shown in figure 1.

For FM radio, it stands out that property is more concentrated than 27 years ago. Broadly speaking, the results of the HHI for FM place three relevant moments that meant strong capital movements, mergers and frequency purchases that impacted concentration levels. First, the entry of Costa Rican businesswoman Roxie Blen Castro into the FM radio business between 1995 and 1996, during which the concentration index increases. The documentation allows us to affirm that there is a relationship between the index increase and the simultaneous administration that Blen Castro performed on FM radio (Blen, 1996, 1997a; Jiménez, 2018; Pereira, 1996). This businesswoman managed at least four radio stations simultaneously through the RCB Radio Group (Blen, 1997b; Jiménez, 2018; Murillo, 1997; Pereira, 1996; Pérez, 1997; Valverde, 1997).

Second, a period of slow but steady increase that represents the emergence of media groups formed to simultaneously manage several FM radio stations. Between 1997 and 2007 there are a series of movements in the index due to purchases and sales of radio stations, as well as alliances that gave rise to the emergence of different groups (Jiménez, 2018). During this period, the Radiocadena Fundación Group was created, composed of the Fundación Ciudadelas de la Libertad and BBC Radio, which joined to manage three FM stations (Acuña, 2003; Elizondo, 1999; Jiménez, 2018; Levi, 2004; Ramírez, 1998; Ramos, 1996). This union caused an increase in the index in 2007.

Another emblematic case in this period is the creation of the TBC Group. This company managed around six FM radio stations between 1998 and 2004 (Calderón, 1998; Campos, 2004a; Castillo, 2006; Ortiz, 1998, 1999, 2002; Valverde, 2000), and would become

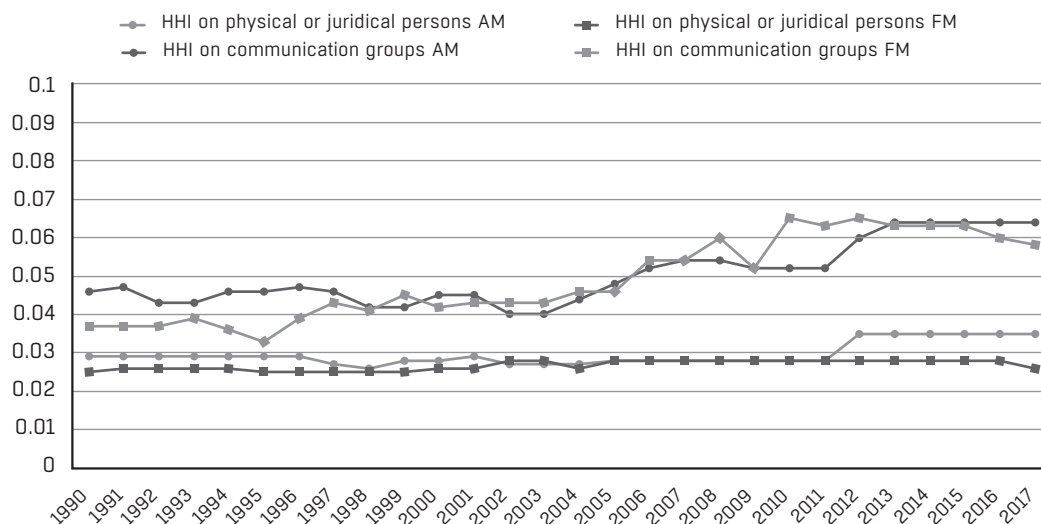


Figure 1. Historical evolution of the concentration index (Herfindahl-Hirschman) in AM and FM radio frequencies, according to the grouping method. 1990-2017

Source: Own elaboration based on the radio frequency files and radio concession contracts, collected and processed in Jiménez (2018).

Costa Rica's largest radio company (Jiménez, 2018). This radio group was part of the Pujol-Martí Group, a conglomerate of the Tena Pujol family with investments in areas such as construction, steel, manufacturing, organic fertilizers, banks and companies in the financial sector (Camacho, 2006; Chaves, 2016; Jiménez, 2018; Robles, 2014). Finally, in 2004, the Monumental-Reloj Group emerged, which managed eight different stations. This group was acquired by another financial conglomerate and subsequently sold to the Repretel Group (Alvarado, 2004a, 2004b; Camacho, 2005; Jiménez, 2018; Pomareda, 2004; Solano, 2004).

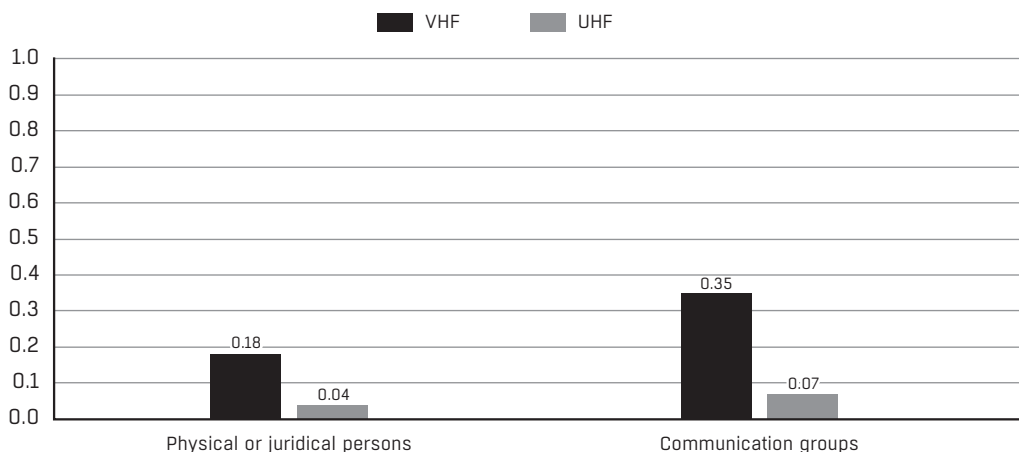
We must consider that many of the business groups of this era emerged and were dissolved in this period for different reasons. For example, the TBC Group changed its name to Cadena Radial Costarricense (CRC) after they formed a business alliance with another entrepreneur (Jiménez, 2018), while the Monumental-Reloj Group disappeared to make way for the Central Radio brand of Repretel group.

Third, between 2005 and 2012, the index increases faster because business groups such as Nación, Repretel or Televisora de Costa Rica began to invest in FM radio. An example of this horizontal concentration practice occurred with the Nación Group, which began to invest in radio through a subsidiary company called Grupo Latino de Radiodifusión, created jointly with Colombian Caracol Group and Spanish Prisa Group. This radio company emerged in 2000, managing two stations, and has remained in force with different

names. Until 2019, the company operated under the name of Prisa Radio Costa Rica and was a subsidiary of Nación Group, from where it managed four FM stations (Beirute, 2003; Campos, 2004b; Grupo Nación, 2009; Jiménez, 2018; MSP, 2002a).

On the other hand, two particularities of AM radio are of interest for the purpose of this article. First, the data show that religious broadcasting has a relevant role in the concentration index. According to the data, the stations linked in some degree of hierarchy or relationship to the Catholic Church of Costa Rica and the Evangelical Churches increased their presence from the beginning of the 21st century, which caused in part the increase in concentration. In these cases, the index augments because the accounting is done by one economic group. For example, if a station has a link with the Catholic hierarchy, it is counted as one more station of the Episcopal Conference. In 2000, there were three stations of a religious nature, a figure that increased in 2016 to reach 11 Catholic or Christian evangelical radio stations (Faro del Caribe, n.d.; MGP, 1981; MSP, 2002b; Radio Chorotega, n.d.; Radio Emaús, n.d.; Radio La Negrita, n.d.; Radio Nueva, n.d.; Stereo Visión, n.d.).

The interest of religious organizations to enter the broadcasting market is not a novelty. The official documentation, as well as previous academic works, show that, since the beginning of radio broadcasting in Costa Rica, in the mid-twentieth century, the Catholic Church and the Evangelical Churches have



Graph 2. Concentration index by band in which Costa Rican open-TV channels broadcast, according to the way of grouping the concession contracts

Source: Own elaboration based on Jiménez (2018).

been concessionaries, through priests or pastors, of different frequencies (Jiménez, 2018; MPJG, 1965). Jiménez (2018) points out that in 1958 a contract for the concession of the 108AM frequency was issued to the religious organization Faro del Caribe, which currently (2018) continues to administer that station (Presidencia de la República, 1958). Another example is the granting of the 1400AM frequency in 1965 to a Catholic priest who appeared as a presbyter in official contracts (MPJG, 1965).

Second, the business movements and concentration practices of the Repretel Group and the former Monumental-Reloj Group also have a direct impact on the concentration ratio in AM radio from the year 2000. It is after this year that there is a significant increase in HHI, when the subsidiary of the Repretel Group, called Central de Radios, begins operations, simultaneously managing four different signals in this band (Pomareda, 2016).

In summary, the concentration of media ownership in both radio bands has increased over the past 30 years. Initially, the variations in the index are explained by capital movements carried out by individuals or families and businesspersons who formed multimedia groups in the sector. These entrepreneurial movements, in addition, were accompanied by horizontal concentration movements of certain television companies, which began to administer radio frequencies.

Open-TV

Before performing the same historical analysis for open-TV, it is important to briefly comment on the

concentration per different bands for contextualization. In Costa Rica, until August 14, 2019, television broadcasts in two bands: Very High Frequency (VHF) or Ultra High Frequency (UHF). The VHF band is the one in which encompasses channels 2 to 13, while the UHF band has the channels from 14 onward. The most coveted signals are those that transmit in VHF due to their high audiences and their technical characteristics (Pomareda, 2016).

This is relevant because if we would only consider the property concentration data for 2018, an initial reading would indicate that the concentration levels are not high according to SUTEL's institutional parameters. However, when the calculation is made by separating the channels, high levels of concentration in the VHF signals are observed, as shown in figure 2. That is, the channels that have the highest concentration are those that, in turn, are the most seen by the people who live in Costa Rica.

The data for open-TV also allow, for the year 2018, to apply the HHI to the audience data obtained in the EGM (figure 3). This shows that there is a high level of concentration in terms of audience, regardless of how the information is grouped. The total audience and in bands, either by channels or by economic communication group, is concentrated in few companies.

This analysis confirms that there is a double concentration in the VHF band. That is, there are not only few owners of television channels, but, in turn, they concentrate the majority of the audience. In this case, the Repretel and Teletica Groups do not only concentrate most of the television channels of this band

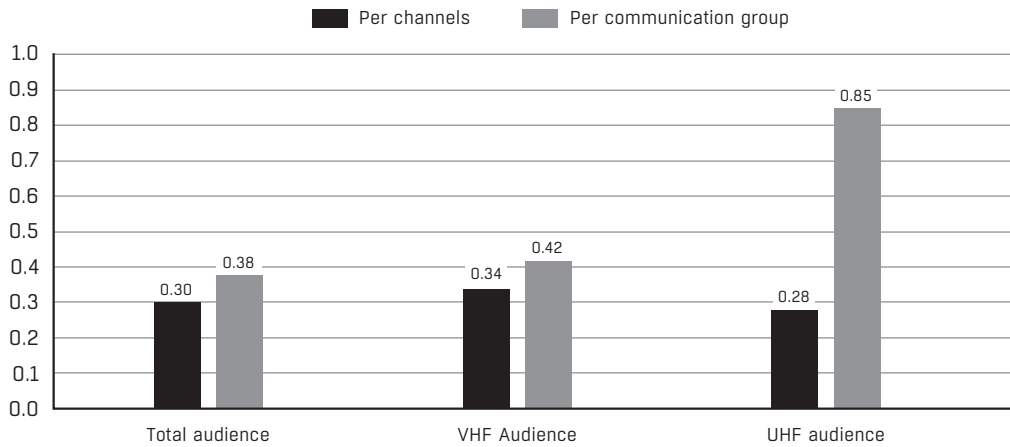


Figure 3. Audience concentration index on open-TV

Source: Own elaboration based on Jiménez (2018).

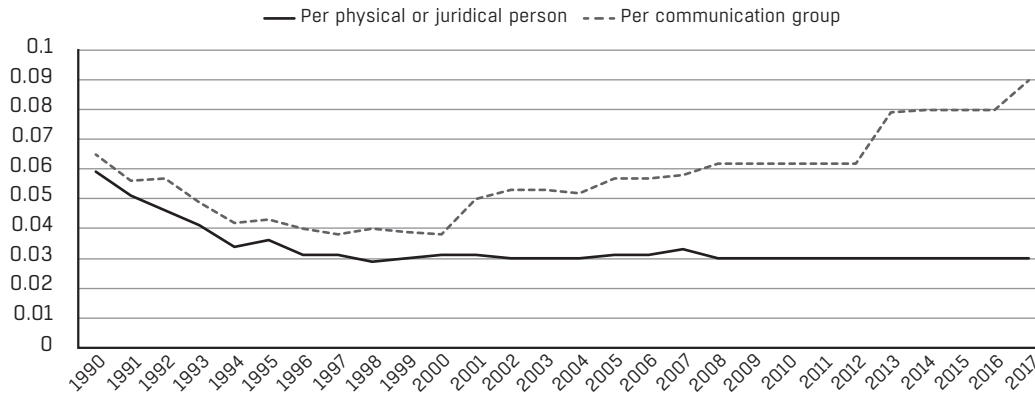


Figure 4. Historical evolution of the concentration index (Herfindahl-Hirschman) in the TV frequencies, according to the way of grouping. 1990-2017

Source: Own elaboration based on Jiménez (2018).

but also account for 80% of the total open television audience in Costa Rica.

Figure 4 presents the historical analysis of the concentration index on open-TV. Two things stand out: first, although the levels of property indices do not yet represent very high concentration levels, according to the SUTEL classification, the index calculated by communication group increases substantially between 2000 and 2017. The historical perspective shows a worrying trend in the concentration of ownership of open-TV. In less than two decades, HHI doubles. The data show that the entry of the Repretel Group to Costa Rica led to an increase in concentration. They also show that the year 2000 was key in the upward trend of the HHI, since from that moment there is a sustained increase.

Second, there is a huge difference between what the evolution of the index calculated based on formal concessions suggests and the index calculated based on the communication groups that actually control the frequencies. The first suggests a situation with virtually no changes in concentration levels, while the second shows that, in reality, concentration increases dramatically. This underlines the importance of studying concentration critically and creatively in order to account for its real levels. In addition, it empirically demonstrates the result of elite practices and strategies to concentrate the possession of the media, which qualitative studies have already discussed (Jiménez, 2018).

The HHI results for open-TV are explained in a more didactic way if they are grouped in three moments.

First, between 1990 and 1996, new contracts for the concession of radio frequencies for television are signed that derive, in practice, from the entry of new operators (Jiménez, 2018). According to the documentation, during this period at least nine new television licenses were delivered to nine different actors (MGP, 1990; MSP, 2002c). This caused the index to fall, as the total active television frequencies increased at the same time as the total number of media actors. This decrease is relevant not only in terms of HHI, but also in terms of diversity of content and plurality, since the increase in actors definitely democratized the television offer and allowed the presence of more owners and companies in this field (Jiménez, 2018).

Second, as of 1997, a steady increase in concentration begins due to the movements of transnational communication companies. This increase is related to the entry and start of operations in Costa Rica of companies such as Grupo Repretel, Enlace TBN and Televisión Azteca de México (Jiménez, 2018; González, 2000) as of 1995. These conglomerates began to acquire frequencies that involved large economic agreements, business alliances and television channel rentals that impacted both the plurality and the index (Jiménez, 2018).

On this, an important acquisition is that made by the Repretel and Enlace TBN groups in 2000. In that year, the media conglomerate Repretel stopped administering channel 9 to start controlling channels 4 and 11 (González, 2000; Guerrero, 2011). Similarly, Enlace TBN began to control channel 41 and channel 35 at the beginning of 2002 and then, in 2005, acquired the frequency of channel 43. Both movements impacted the HHI index, which shows that it is useful for measuring the changes in concentration over the years if one looks at the communication group that really controls each frequency.

Third, between 2008 and 2012, as well as 2013 and 2016, there is a stabilization of the HHI. This occurs because the dominant media actors halted the expansion they made across the spectrum in previous years. This paralysis is related more to a material impossibility of continuing to accumulate frequencies—since they were no longer able to grow in the bands with more audience—than with a decision to stop (Jiménez, 2018). Currently, the Repretel Group simultaneously manages four open television frequencies plus four repeater signals, which are frequencies used to retransmit the main frequencies with the objective to cover larger geographical areas in Costa Rica. Similarly, the Multimédios company manages the operation of channels 44 and 66 (Herrera,

2016; Madrigal, 2016; López, 2016; Zúñiga, 2016).

In short, in open-TV there is not only a high concentration of property and audiences in the VHF band, but there is also a historical upward trend in property concentration. That is, there is scenario that is not plural or diverse, in which fewer and fewer companies, which in turn are the most watched, decide which contents are broadcasted.

MEDIA GROUPS AND CONCENTRATION

If the historical results and the media scenario are considered, we can affirm that, by the end of the period under study, there are five communication groups that are the undisputed protagonists of the Costa Rican media concentration: Repretel Group, Nación Group, Televisora de Costa Rica, Enlace Group and the Episcopal Conference of Costa Rica. These five are responsible for movements in the exposed index, for concentrating audiences or for accumulating frequencies of the radio spectrum.

These communication groups have several similar characteristics. For example, they maintain more than one frequency of the radioelectric spectrum, either on television or on radio, while executing horizontal concentration practices (Fournier et al., 2018). In addition, most have diversified their investments due to the international crisis of the commercial communication model (Jiménez, 2018).

Although this work does not aim to characterize these groups, each one has a series of particularities that must be noted in order to provide a better understanding of the media dynamics of Costa Rica. The Repretel Group is part of the Albavisión Group, which manages 25 television channels and 68 radio stations throughout Latin America (Albavisión, n.d.). Currently, it manages four television channels and nine radio signals in AM and FM. In addition, it has investments in the business of gastronomy, electronic commerce and movie theaters (Jiménez, 2018).

On the other hand, the Nación Group is one of the most relevant media-business actors in Costa Rica. It is the communication group *par excellence*, which is publicly traded and has experience in radio, newspapers, magazines and other series of investments in the area of entertainment, gastronomy, technology and event production (Leandro, 2013; Córdoba, 2016). In addition, they are owned by the Jiménez family, a *business clan* with investments in sugar production, real estate, beverage production, fast food, among others (Robles & Voorend, 2011).

Televisora de Costa Rica is another of the traditional communication groups in the country. With more than half a century of experience in television, it currently maintains two open-TV channels, two cable channels, investments in a cable operator and sports teams (Brenes & Morales, 2013; Lobo, 2008). The leadership of this group is also of a family nature, since the company belongs to the second generation of the Picado family.

Finally, there are the cases of the Enlace Group and the Episcopal Conference. In the case of the first group, it is an international emporium of evangelical-Pentecostal communication with 27 years of existence, which currently manages five television frequencies by which they broadcast in two signals on open television (Jiménez, 2018). In the case of the Episcopal Conference, it is the highest political body in the Catholic hierarchy of Costa Rica, which currently manages nine radio stations, in addition to several open television frequencies (Jiménez, 2018).

CONCLUSIONS

In this paper, we empirically measured the concentration of property on radio and television in Costa Rica for the period 1990-2017, using an adapted version of the HHI. The application of this historical lens to the concentration data represents a novelty and is the main contribution to the political-public and academic debates of this article.

The analysis demonstrates, first, that in Costa Rica there is a tendency to concentrate ownership in electronic media from 1990 to 2017, both on radio and on open television. Today there are fewer owners in the Costa Rican media system than three decades ago. This historical perspective contributes to the understanding of the complexity of studying the media and its ecosystem, although it is necessary to complement this analysis with data on the concentration in advertising and audiences. Such an approach, complementary and comprehensive, would allow to identify trends and analyze them in the light of a period or a social political situation. In addition, it would also allow contrasting the power of a specific media group with its weight within the distribution of the agenda or audience.

Second, there is an increase in transnational capital within the Costa Rican media system directly related to the increase in ownership concentration. Although companies with national capital continue to exist, the role of commercial companies with transnational capital in the media system studied is indisputable.

These companies –among which the Repretel Group, Enlace TBN or the Catholic Church itself stand out– have become key players in the Costa Rican radio spectrum, as well as in broadcasting in general.

Third, we demonstrated the importance of analyzing property concentration by economic group and by formal concessionaires, not only by the officially registered legal status. When tracing real ownership, it suggests a substantially higher concentration than what the legal status of media companies would suggest. In other words, an economic group may own a communication company, a television signal or a radio station without its name appearing in a single formal administrative or legal document.

Fourth, the study of property is necessary but insufficient to fully understand media concentration. Media concentration is a complex problem, with multiple manifestations, causes and types, the approach to which should be as wide as possible. Therefore, it is also necessary to consider, when the data allows it, both the audiences and advertising incomes.

DISCUSSION

Although the absence of public information on the earnings of electronic media or on the sale of advertising is an important limitation for this work, we offered an approach to the concentration of audiences on open-TV that showed high levels of concentration in two media groups: Repretel and Teletica. That is, it was corroborated that in the case of the television scenario there is a double concentration, both in property and in audiences. In the case of radio, the task remains to study the subject in depth.

These type of studies are of the utmost importance to evaluate the health of the media system and, therefore, of democratic systems. This health does not only depend on the existence of different voices and visions of the world that are contrasted in the public space, but also on a plural media system with wide diversity, which allows all these perspectives to be expressed openly and visibly in the mass consumption platforms. If this does not happen, freedom of expression and the right to information of citizens are limited, while democracy is injured (UNESCO, 2017).

In this regard, our analysis reinforces concerns about the Costa Rican legal framework in broadcasting (CGR, 2012; PGRCR, 2013, 2016), which seems to be outdated, largely ignored and has a several legal loopholes, which facilitate concentration. In that sense, it is vital for Costa

Rican democracy to update these norms in order to ensure pluralism and media diversity. It is urgent for the country's democratic system that the legal framework of broadcasting includes antitrust rules, public access to information on communication groups, concentration legislation, as well as general guidelines that respect and allow applying the jurisprudence of the Rapporteurship of Freedom of Expression in broadcasting.

The fact that there are fewer media owners today than 17 years ago diminishes the possibility that the democratic system has a plural, diverse, and open public sphere, sufficiently representative of Costa Rican society. It also undermines the possibility that the citizens of this country have a diverse media scenario, where all citizen voices have a place and where there is a real representation of all actors (Vike-Freiberga,

Däubler-Gmelin, Hammersley, & Pessoa, 2013). This trend, in other words, results in a decrease in the diversity of options in news, entertainment, popular culture or information (Bagdikian, 1983).

Since there is no legislation that obliges concessionaires to report economic groups with which they maintain links, nor are there legal frameworks that facilitate obtaining information about the different actors, concentration research should be based on what is obtained through empirical research, periodical publications, websites or other types of information sources such as electronic communications found in the files analyzed for this article. Where possible, the measurement of audience and income concentration should complement the work of measuring property concentration for a more comprehensive reading.

NOTAS

1. In Costa Rica, the broadcasting sector is changing due to a series of legal factors that facilitates the acquisition, sale or rental of frequencies and, therefore, of media signals. Therefore, the index result may have changed at the time of publication. Thus, it is essential to continue deepening this issue, both from the academia and from civil society, to always have the most detailed and updated information of the Costa Rican media landscape.

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ABOUT THE AUTHORS

Óscar Mario Jiménez, political scientist from the Universidad de Costa Rica. Master's in Communication and Development from the same university. Researcher in matters of communication and political communication. Former parliamentary advisor and political advisor in the Ministry of Communication of the Government of the Republic of Costa Rica.

Koen Voorend, Ph.D., professor at the Universidad de Costa Rica, as a researcher at the Institute for Social Research and professor at the School of Collective Communication Sciences and the postgraduate degree in Communication and Development.