







Structure of media and communication companies in Ecuador



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

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Abstract: The lack of information about the media landscape in Ecuador has prompted the Department of Communication Sciences at the Private Technical University of Loja to map the country's media, production companies, and advertising and public relations agencies. The need for a database on communication issues is still latent in Ecuador. Some public and private agencies have made some contributions to the construction of physical or virtual repositories, but the data provided have been limited to basic, often outdated, contact information. Based on a sample of over one thousand media companies, this study describes their structure, legal and corporate organisation, geographical location, contents, reach, and provided services. This study is an approximation to the country's media reality and is part of a wider research project entitled "Mapa de la Comunicación de Ecuador" ("Ecuador's Media Map").

Keywords: Ecuador; census; media; newspapers; TV; internet.

Summary: 1. Introduction. 2. Methods. 3. Results. 4. Conclusions. 5. Bibliographic references. 6. Electronic references. 7. Notes.

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1. Introduction

The landscape of media and communication companies in Ecuador is little known, in terms of their corporate organisation, structure, human resources, and products and services. This need has motivated this research study which aims to provide a database for researchers, teachers, students and the general public interested in the subject. In addition, this type of information is an important step to promote the establishment of strategic frameworks for the development of the media and communications sector, like the private and public policies needed for the development of media companies for the benefit of the communities they serve.

The results of our study will be presented in a yearbook called *Anuario de la Comunicación del Ecuador 2011-2012* (Ecuador's Media Yearbook 2011-2012), which will be published by the Private Technical University of Loja and will significantly tackle the shortage of sources of information related to the country's media and communication companies.

It is worth mentioning that this research work arose from the research projects contest of the Private Technical University of Loja [2] and the mass graduation programme of its School of Social Communication. Initially this research project sought to contribute to the development of methodological strategies for the collection, analysis and validation of content, and to contribute to the development of the three research lines currently followed at the Department of Communication Sciences of the Private Technical University of Loja: Journalism and Technologies; Audiovisual Narratives and Organisational Communication[3].

The following media research works conducted in Latin America and the rest of the world with census purposes were reviewed and used as models to develop the guidelines of our project:

- a) **“Mapping the media in the Americas”**: initiated in 2004 by the Canadian Foundation for the Americas, the Carter Center, and the University of Calgary. The objective of this project was to investigate the relationship between media companies and democracy in Canada and 11 Latin American countries. The project provides information about the location, reach, ownership and structure of Latin American media companies (including television, radio, and print media), as well as key data on demography and election results. To create virtual maps the authors used a Geographic Information System (GIS)[4] that uses advanced software to convert static maps into interactive maps accessible over the Internet.

- b) Argentina's media map:** developed during 2008 and 2009, this project documents the main power relations between Argentina's media and financial monopolies, and graphically represents the media concentration in six main companies: Clarín Group, Hadad Group, Cadena Tres, Telefónica Group, Prisa Group and Vila Manzano de Narváez Group.

- c) Spain's media map:** Provides an interactive interface that presents the main media companies in Spain and their connections with other financial sectors in the country. Developed by the *Ymedia* agency, it can be visualised in categories: groups, television, radio, etc.

- d) Media Map of the European Journalism Centre:** This organisation collects information from the media of each EU country and presents it through an interactive map. The information is organised into: traditional media (press, radio and television), cinema, telecommunications, new media, digital media, news agencies, international agencies. Additionally, it describes the technological and legal context of these companies.

A map is defined as the flat representation of a part of the Earth's surface, and communication as the activity that involves the sending and receiving of messages through informational processes. The project is called *Mapa de la Comunicación de Ecuador* (Ecuador's Media Map), and refers to the cartographic representation of the media companies. The ultimate purpose of this research is the creation of an interactive map where information about communication companies can be accessed through the Internet.

2. Methods

The development of this project was motivated by previous research studies that highlighted the scarcity of sources of detailed and unified information on media and communication companies in Ecuador. The information obtained by governmental and private sources consists of basic and contact information that is largely inaccurate, incomplete or outdated.

Among the governmental sources available in Ecuador are the Superintendency of Telecommunications (SUPERTEL) and the Superintendency of Corporations (SUPERCIAS), which collect important information about the media companies' location, directors and capital type. Moreover, Ecuador's Internal Revenue Service (*Servicio de Rentas Internas*, aka SRI) provides information about the media companies' name, starting date of activities, organisation type, legal representatives, and tax status.

Regarding private sources, there are media directories edited by the *AS producciones* agency and the Foreign Press Association in Ecuador. These directories provide basic contact information and location information such as physical address, telephone numbers, and directors' names.

Restructuring of the media companies is currently taking place in Ecuador at the management, labour and production organisation levels due to the driving forces of the market, which have been accelerated by the recent political, legal and technological developments. Therefore, it is necessary to update most of the information.

2.1. Techniques

2.1.1. Quantitative analysis

The analysis of the current situation of the media landscape in Ecuador is based on governmental sources such as the Internal Revenue Service, the Superintendencies of Telecommunications and Corporation, the Cinema Council, as well as on private publications like the media directories published by *ASProducciones* and the Foreign Press Association in Ecuador, and the virtual database of our project, *Mapa de la Comunicación del Ecuador* (Ecuador's Media Map).

2.1.2. Qualitative analysis

Six aspects of the current situation of media and communication companies in the country were analysed based on the critical reading of our Media Map: 1) background; 2) legal and corporate organisation; 3) geographical location; 4) structure; 5) demographic situation; and 6) products and services. Based on these results, our media map will become a source of information accessible to anyone and will allow users to know and understand the reality of media and communication companies.

2.2. Instrument

The form used to collect the information about the media companies was divided into 9 sectors, which can be grouped into 3 broad categories: audiovisual media; printed media and digital media; and organisational communication.

Information gathering form, part 1

LEGAL & GENERAL INFORMATION										
1.	Company name:									
2.	Registered name:									
3.	Taxpayer Identification Number:									
4.	City:									
5.	Physical address:									
6.	Location information	Phone:			Fax:		E-mail:		Web:	
		Zip code:			Blog:		Facebook:		Twitter:	
7.	Name of founders:									
8.	Names of owners (shareholders):									
9.	Names of legal representatives:									
10.	Names of directors:									
11.	Is it part of a group of companies?			Yes ()		Not ()		Name of the group:		
12.	Date of Foundation:									
13.	Corporate mission:									
14.	Ownership	Public ()								
		Private ()		Of what kind?		Limited company ()	Mixed ventures ()	Public Limited company ()	De facto business association ()	
15.	Type of social capital	Subscribed ()			Authorized ()			Value per share ()		
16.	Sector	Press ()	Digital Media ()	Magazines ()	Radio ()	TV ()	Audiovisual production company ()	Film production company ()	Marketing and advertising agencies ()	Public relations agencies ()

Source: *Anuario de la Comunicación del Ecuador 2011-2012*.

The printed and digital category contains 3 sectors:

- 1. Press [5]:** consisting of all the national, regional and local newspapers that circulate in the country, with a daily, weekly or fortnightly periodicity, although there are regional and cantonal newspapers that are published less frequently.
- 2. Magazines [6]:** this sector includes all specialised publications in the country, regardless of their format and circulation frequency.
- 3. Media digital [7]:** this category includes the new Internet-based media with multimedia formats which have resulted from the convergence of traditional media. This sector includes all media with digital platforms without considering the online versions of the printed and audiovisual media that are studied as part of other categories.

Within this category there are also companies with similar sectors which are not relevant to the project. For example some websites cannot be considered digital media

due to their lack of informational elements, like news, feature articles, chronicles, editorials, which define the traditional media: press, radio and television.

Within the audiovisual category we find 4 sectors:

1. **Radio [8]:** Investigates radio stations broadcasting across the country in these frequencies: short wave (SW), amplitude modulation (AM) and frequency modulation (FM), as well as all the central and branch stations that broadcast their programming.
2. **TV [9]:** Includes all local and regional television channels, stations and branches with own production, as well as open-to-air and restricted signals (UHF/VHF and cable channels).
3. **Audiovisual media production companies [10]:** this category involves all companies that offer services of pre-production, production and post-production of commercials, television programmes, or other audiovisual media products.
4. **Cinematographic production companies [11]:** This is a specialised sector within the audiovisual media production sector. This category investigates the companies dedicated to the production of films, documentaries, short films, feature films and other film genres.

There are other companies that are part of the communications sector but are not taken into account in this research because they are not media companies or their production is not directly related to the sectors of interest for our research. Outside the audiovisual media category are companies that provide cable TV services but do not produce audiovisual media products nor have their own channel. Others companies offer audiovisual media production services but as a secondary or tertiary activity as it is the case of graphic or website production companies. This study considers all of these companies as intermediaries of the investigated sectors.

Finally, the category of organisational communication includes 2 sectors:

1. **Marketing and advertising agencies[12]:**This sector comprises all companies that offer services of planning and placement of ads, and are usually intermediaries between the client, the audiovisual production companies and the media. Some of these companies have a graphic or audio-visual production department, or a department that supports the advertising campaigns with public relations activities.

2. **Public relations agencies [13]:** This sector includes those companies that plan and carry out mass media activities that integrate efforts to manage the public image of organisations and increase their sales as activities complementing advertising. There are companies that integrate the advertising and public relations sectors.

These sectors do not include those companies whose economic activity is related to the production of graphic material for advertising purposes, such as posters, banners or flyers, and those that only offer alternative services to agencies: consultancy, instant messaging or the production of other advertising materials.

3. Results

The research in Ecuador was based on the database created with the available information. 1355 Media and companies were surveyed. During the survey it was verified that 193 media companies no longer exist, 61 refused to collaborate with the study, and 1101 provided useful information for the analysis. The collected information was grouped in three major sectors, with their corresponding subsectors (table 1).

Table1: Companies and agencies included in the Media Map

Sectors		With data	Without data	Defunct	Total in database
Media companies	Press	57	0	0	57
	Magazines	44	5	6	55
	Digital media	15	2	0	17
	Broadcast television	41	0	3	44
	Cable television	129	1	11	141
	Radio	589	0	60	649
Production companies	Audiovisual	64	12	30	106
	Cinematographic	11	0	3	14
	Audiovisual and Cinematographic	12	0	0	12
Agencies	Advertising and Marketing	123	41	77	241
	Public relations	16	0	3	19
TOTAL		1101	61	193	1355

Source: Own creation based on the database of the *Mapa de la Comunicación del Ecuador*, 2011.

The study only took into consideration those media and companies that were in operation at the moment of the survey and provided all or part of the requested information [14].

3.1. Legal and corporate organisation

This variable includes data such as company name, corporate name, taxpayer identification number (known as RUC in Ecuador), type of social organisation, and constitution type. The information provided by the representatives of the surveyed companies was verified and contrasted with the databases of the respective public agencies: the Internal Revenue Service and the Superintendency [15].

Table2: Social organisation of the media and companies

Sectors	Social organisation			
	Public	Private	Seized	No data
Press	3	54		
Digital media	1	14		
Magazines	1	41	2	
Broadcast TV	1	38	2	
Cable TV		129		
Radio	17	564	6	2
Audiovisual media	1	63		
Cinematographic		11		
Audiovisual and Cinematographic		12		
Advertising and Marketing		123		
Public relations		16		
Total	24	1065	10	2

Source: Own creation based on the database of the *Mapa de la Comunicación del Ecuador*, 2011.

As table 2 shows, the social organisation of the media companies is mostly private (96.63%), while only 2.18% is public. Table 2 shows the media companies that have been seized (0.91%) in a separate category because their legal constitution is private but they are currently being administered by the State, after being seized in 2008[16] by the extinct Deposit Guarantee Agency of Ecuador (aka AGD [17]). The remaining media companies (0.18%) did not provide information needed to identify their organisation type, such as company name or taxpayer identification number (*RUC*).

3.1.1. Types of legal constitution

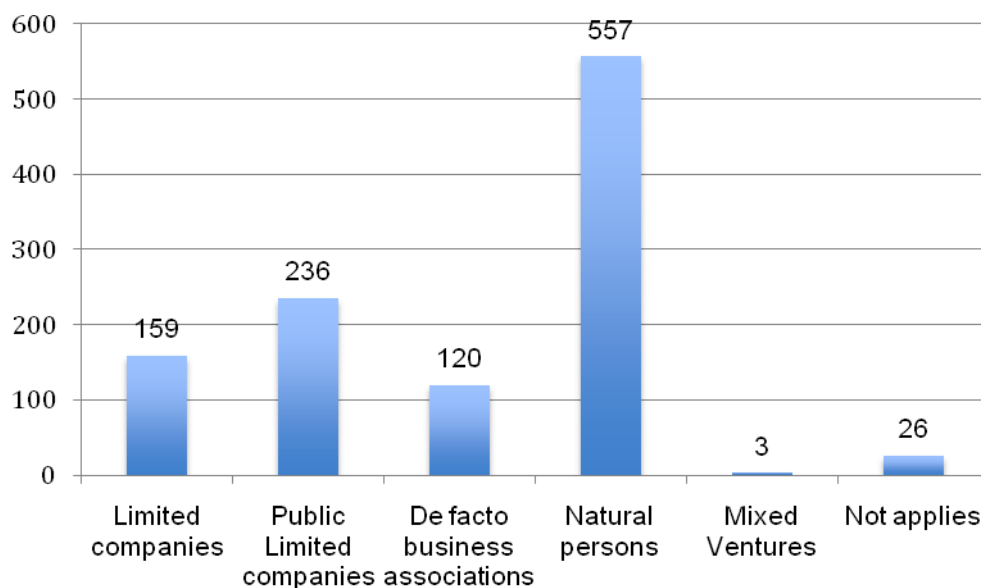
The study identified the following types of legal constitution, as defined in Ecuador’s Companies act (*Ley de Compañías*) in the following manner:

Article 92: Limited liability companies are those owned by three or more persons, whose social obligations depend on the size of their individual contributions (...).

Article 143: Public limited companies are those whose capital, which is divided into tradable shares, is formed by the contribution of the shareholders who respond only according to the amount of their shares.

Article 308: The State, municipalities, provincial councils and public entities or organisations may participate, jointly with private capital, in the capital and social management of this company.

Figure 1: Legal Constitution



Source: Own creation based on the database of the *Mapa de la Comunicación del Ecuador*, 2011.

Regarding the type of legal constitution, 50.59% correspond to natural persons; 21.62% to public limited companies; 14.44% to limited companies; 10.90% to de facto business associations; and 0.27% to joint ventures. Moreover, 2.18% of the companies do not fall under a specific type of constitution because they are public

media (this figure also includes the two radio stations that did not provide this information). Figure 1 shows the distribution of companies according to their legal constitution.

The vast majority of the media are registered as natural persons, with the name of their owner or legal representative. This type of legal constitution is more frequent in the broadcasting sector. It is necessary to explain that the category of de facto business associations includes non-profit private legal entities such as NGOs, religious and educational communities, associations, trade unions and civil societies.

Table3: Seized companies

Company name	Registered name	Legal Constitution	Current legal status
El Agro magazine	Editorial Uminasa del Ecuador S.A.	Public limited	Active
La Onda magazine	Editorial Uminasa del Ecuador S.A.	Public limited	Active
Gama TV	Compañía Televisión del Pacífico Teledos S A.	Public limited	Active
TC televisión	Cadena Ecuatoriana de Televisión CA Canal 10 CETV	Public limited	Active
Radio Carrousel AM	Organización Radial C.A	Public limited	Inactive
Radio Carousel 660 AM	Organización Radial C.A.	Public limited	Inactive
Radio Carousel 900 AM	Radio Bolívar SA	Public limited	Inactive
Radio El Telégrafo AM	Radio La Prensa TV S.A.	Public limited	Inactive
Radio La Prensa	Radio La Prensa TV S.A.	Public limited	Inactive
Radio Súper K800	Radio Bolívar S.A	Public limited	Inactive

Source: Own creation based on the database of the *Mapa de la Comunicación del Ecuador*, 2011, and information from the Superintendencies.

Table 3 shows the different legal constitutions of the formerly private companies that were seized by the state and are currently managed by it.

3.1.2. Media and business Groups

In his article *El quinto poder* (The fifth power), the Spanish journalist Ignacio Ramonet points out that “the mass media (radio stations, printed press, television channels, the Internet) increasingly tend to merge into huge structures to form conglomerates with international vocation” (Ramonet, 2004). This author also

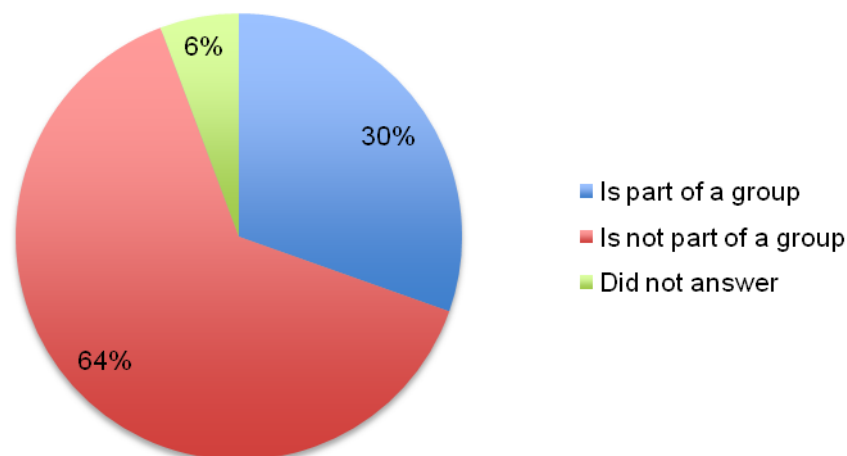
indicates that media companies are inclined to form groups that unite the traditional media and those activities related to mass culture, communication and information.

With respect to the conglomerates, Ecuador’s Internal Revenue Service indicates that in 2002 it identified 11 powerful business groups in the country, which included the main national media. This number increased to 17 by 2007 and to 100 in 2012, which highlighted the trend towards the dispersion and distribution of capital, which used to be in the hands of a few powerful groups and now is originating new groups.

The dissolution of large groups and the emergence of new were partly provoked by the mandatory separation between banks and media companies, which resulted from the adoption of the new Constitution of the Republic of the Ecuador in 2008 and its ratification 3 years later by referendum by the people of Ecuador[18].

With regards to the economic groups, Ecuador’s internal tax regime law (*Ley de Régimen Tributario*) defines them as “the set of parts, formed by natural persons and companies, both national and foreign, where one or more of them directly or indirectly own 40% or more of the shareholding in other companies” [19].

Figure 2: Media or business group



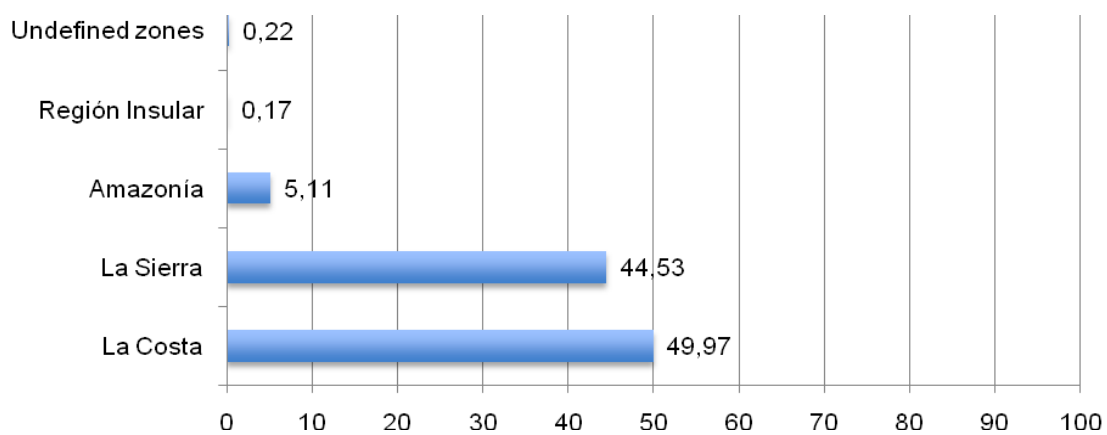
Source: Own creation based on the database of the *Mapa de la Comunicación del Ecuador*, 2011.

The study of the Ecuadorian media, production companies and agencies reveals that 30.43% of them belong to a media or business group (figure 2).

3.2. Geographical situation

The Ecuador is divided in four natural regions: *La Costa* (or the coast), *La Sierra* (“the highlands”), *Amazonía* (also known as *El Oriente* [“the east”]) and *Región Insular* (comprising the Galápagos Islands). Figure 3 shows the percentage distribution of the population across regions, according to the last population and housing census of population of 2010.

Figure 3: Distribution of the population across regions



Source: Own creation based on information from INEC (Ecuador’s National Institute of Statistics and Census), 2012.

The results show that the greatest business and media concentration occurs in La Costa and La Sierra [20] (table 1) and that this corresponds to the number of inhabitants in these two regions: 7,236,822 and 6,449,355, respectively. The third greatest concentration occurs in *Amazonía*, which has 739,814 inhabitants and 103 media companies and 1 audiovisual production company.

Table 4: Geographic location of media and communication companies

REGIONS	Media Companies		Production companies		Agencies	
	N°	%	N°	%	N°	%
La Costa	354	40.46 %	21	24.14 %	51	36.69 %
La Sierra	418	47.77 %	65	74.71 %	88	63.31 %
Amazonía	103	11.77 %	1	1.15 %	0	0.00 %
Total	875	100.00 %	87	100.00 %	139	100.00 %

Source: Own creation based on the database of the *Mapa de la Comunicación del Ecuador*, 2011.

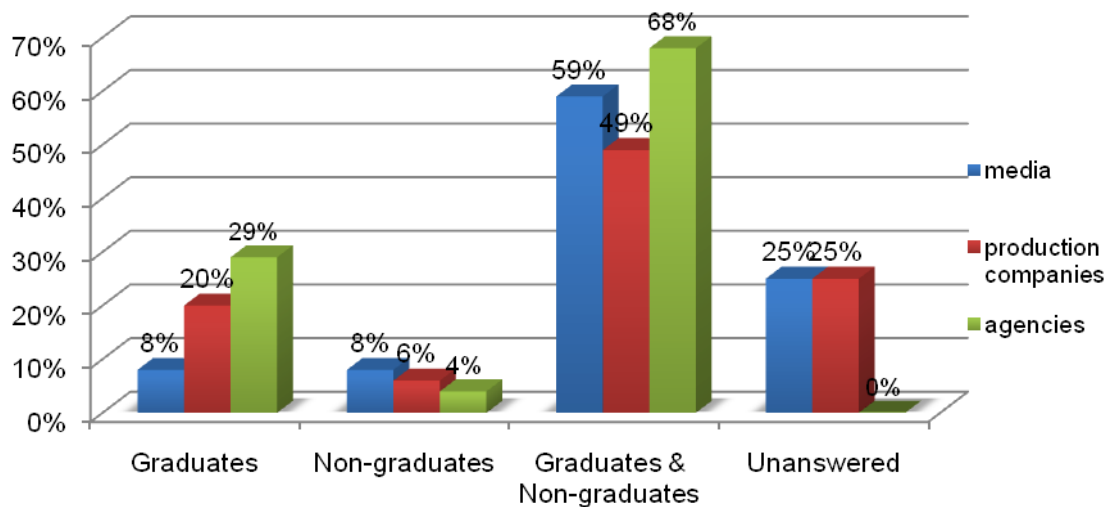
3.3. Demographic situation

The access to the human resources data of the media and communication companies was the hardest to obtain. Our questionnaire included general categories such as number of staff in each area, according to the administrative organisation of each sector, and total number of employees and education level: number of employees with and without third level education.

The level of education people working for media and communication companies contrasts with the Population and Housing Census conducted in Ecuador in 2010, which indicates that 0.93% of the population works on the "information and communication" sector, out of a total of 14,483,499 inhabitants [21].

Information about workers' education was the most collected type of data. 129 companies revealed that their staff completed a B.A. degree; 77 have employees without a B.A. degree; 653 companies have both graduates and non-graduates; and 242 companies did not share this information.

Figure 4: Education of staff across sectors



Source: Own creation based on the database of the *Mapa de la Comunicación del Ecuador, 2011*.

The previous figure shows the distribution of worker's education across the three major sectors in which companies are divided. As we can see most companies hire graduates and non-graduates.

3.4. Products and services

3.4.1. Media companies

The services offered more frequently by the media are advertisements and classified ads, which are also considered a form of advertising. Also on offer are other products and services specific to each sector. For example, in the case of the print media they provide advertorial, printing and publishing services, among others. The audiovisual media offer presenters and entertainers for a variety of events and productions.

Table5: Most offered services by the media

Sectors	Advertising	Classified ads
Press	95.50 %	93.00 %
Magazines	95.50 %	13.60 %
Digital media	80.00 %	----
Broadcast TV	92.70 %	63.40 %
Cable TV	43.40 %	31.00 %
Radio	84.40 %	66.50 %

Source: Own creation based on the database of the *Mapa de la Comunicación del Ecuador*, 2011.

3.4.2. Production companies

In order to stay active in the market, production companies are dedicated to provide the services and products customers request.

- *Audiovisual production companies* create such products as radio and television commercials, and corporate image design, among others.
- *Cinematographic production companies* are dedicated to the production, filming and screening of documentaries, short films, and feature films, among others.

3.4.3. Agencies

Agencies also tailor their services and products to the demands of their clients and work in a coordinated manner with the production companies and the media in order to offer an integral service.

- The services provided by *advertising and marketing agencies* are grouped into market research; consultancy; design and production of advertisements; and planning and purchase of advertising on the internet, among others.
- Similarly, *public relations agencies* provide such services as consultancy, action planning, publicity, and internal communication, among others.

4. Conclusions

The analysis of the media, production companies and agencies has allowed us to draw the following conclusions:

- Despite Ecuador guarantees access to information, through its Law of Transparency and Access to Public Information, there were public and private companies that were not willing to share some information such as Taxpayer Identification Number; name of founders, owners, legal representatives and directors; and especially information about their human resources.
- Our Media Map Database includes all the media companies that agreed to provide the information requested in the survey. Although it does not include all media companies operating in Ecuador, the obtained results provide a close approximation of the situation of each sector, around the investigated variables.
- The vast majority of media companies are registered in Ecuador's Internal Revenue Service, for billing purposes, and in the Superintendency of Corporations.
- 96.63% of media companies belong to the private sector, 2.18% are public entities, and 0.91% were funded as private companies but are currently seized and administered by the government.
- With regards to ownership, 50.59% are owned by natural persons; 21.62% by public limited companies; 14.44% are limited liability companies; 10.90% are de facto business associations; and 0.27% are joint ventures. Meanwhile, 2.18% do not fall under a specific type of constitution since they are public media.
- The study reveals that 30.43% of media companies belong to a media or business group.

- The highest level of media concentration occurs in the regions known as *La Costa* (426) and *La Sierra* (571). *La Amazonía* occupies the third place in media concentration with 103 media companies and 1 audiovisual production company.
- Access to human resources information is low in comparison to access to other requested information. The demographic situation is similar in all sectors. Very few companies offer the services of graduate professionals.
- Regarding the offer of services, advertising is the most offered by the media and communication companies. In the case of the production companies, the most offered services are audiovisual and cinematographic productions. In addition, each sector offers its own specific services.
- As mentioned, this research project has resulted in the production of the *Anuario de la Comunicación del Ecuador 2011-2012* (Ecuador's Media Yearbook 2011-2012), which is offered in printed and digital forms by the Department of Communication Sciences of the Private Technical University of Loja. The research team expects the following editions to include unpublished social communication research works carried out in the country.

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Superintendencia de Telecomunicaciones. <http://www.supertel.gob.ec>

7. Notes

1. The authors of this article are professors at the Department of Communication Sciences of the Private Technical University of Loja and teach in the B.A. Social Communication programme of this university.

2. See: www.utpl.edu.ec.

3. *Anuario de la Comunicación del Ecuador 2011-2012*, published by the Department of Communication Sciences of the Private Technical University of Loja.

4. A Geographic Information System is a new technology that facilitates the management and analysis of information and has resulted from the need to access information rapidly to solve problems and answer questions immediately (Peña, 2008, p.3)

5. Gabriela Coronel-Salas: *Anuario de la Comunicación del Ecuador 2011-2012*

6. Patricio Barrazueta: *Anuario de la Comunicación del Ecuador 2011-2012*

7. Ibid 5. Ecuador has shown a remarkable growth in connectivity in comparison to other Latin American countries. In 2012, Internet penetration reached 34.3%, which is reflected below:

Coronel Salas, G. (31 July, 2012). Doctoral thesis: *Análisis de la Blogosfera de Ecuador: mensaje, narrativa y herramientas* (Analysis of Ecuador's blogosphere: message, narrative, and tools). University of Santiago de Compostela.

8. Diana Banegas: *Anuario de la Comunicación del Ecuador 2011-2012*

9. Carlos Ortiz: *Anuario de la Comunicación del Ecuador 2011-2012*

10. Ibid 9.

11. Verónica González: *Anuario de la Comunicación del Ecuador 2011-2012*

12. Fanny Paladins: *Anuario de la Comunicación del Ecuador 2011-2012*

13. Jenny Yaguache & Karina Valarezo: *Anuario de la Comunicación del Ecuador 2011-2012*

14. The collected information corresponds to 4 variables: legal and corporate information, structure, human resources, products and services. Information on human resources was provided less than the others types of information.

15. The Superintendency has the information on commercial companies; while the Internal Revenue Service registers the taxpayer identification numbers of all natural and legal persons under public and private law. Private legal entities are those which arise from the private initiative and are established with private funds. They are divided into two groups: 1) profit organisations, the so-called business corporations, and 2) non-profit organisations like foundations, corporations and associations. Public legal entities are public bodies and institutions.

16. The government seized these companies to sell them later and recover the 661 million dollars in damages left by *Filanbanco* (owned by the Isaías-Dassum brothers) after the 1998 financial crisis. The initial promise was to sell them after a maximum of six months. However, in 2011 only 22% and 25% of the shares of two channels, GamaTV and TC, were sold to their workers. Available at: http://www.lahora.com.ec/index.php/noticias/show/1101302382/-1/Medios_incautados__sin_plazos_de_venta.html (retrieved on 26 July, 2012).

17. This autonomous entity was created in 1988 by the Ministry of Economy and Finance of Ecuador, which for 11 years monitored the financial dynamics of the country and took part in the administration of the financial institutions at risk.

18. The survey contained 10 questions. The third item focused on the prohibition on owners of financial institutions to also own shares in private media companies, and vice versa. The survey mentioned that the Internal Revenue Service could consider other factors of relationship between the parties composing the economic groups, with respect to the direction, management and commercial relationship. This criterion also applies for the identification of private business groups, that also own one or more media companies, and of media groups that operate in different sectors: radio, television, newspapers, etc.

19. Economic groups. Available at: <http://www.sri.gob.ec/web/guest/grupos-economicos> (retrieved on 25 June, 2012).

20. The information included in Ecuador's Media Map was collected nationwide, except in the insular region and the province of Santa Elena.

21. INEC (Ecuador's National Statistics and Census Institute) (27 June, 2010). Retrieved on 27 June, 2012, from: <http://www.inec.gob.ec/estadisticas/>

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