

5 Country report Spain

Surfing the waves of crises – Spain’s framework conditions for innovations in journalism

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Introduction

This chapter explores the framework conditions for innovation in journalism in Spain by examining three interconnected levels: macro (historical and social preconditions), meso (industry conditions), and micro (professional and cultural preconditions). We have drawn from the national systems of innovation theory (Lundvall 2016), which suggests that modern Western nation-states have historically acted as “engines of growth” through their social institutions and policies for economic transformation and innovation. However, innovation is influenced not only by science and research and development (R&D) but also by learning from entrepreneurs and professionals and their routine activities for production, distribution, and consumption, which shape the direction of innovative efforts (Lundvall 2016). Individual entrepreneurs are also key players in introducing innovations into the economic system (Schumpeter 1983).

Spain’s population of nearly 48 million increased during 2022 thanks to a positive migratory balance, which offset a negative birth rate and the impact of the COVID-19 pandemic. The Spanish economy ranked fourth in the European Union in terms of nominal gross domestic product (Eurostat 2021) and has faced a severe recession and a significant societal impact since the 2008 financial crisis, which also affected media industries. The unemployment rate peaked at 27% in 2013 before dropping to 13% in December 2022. Like other countries, Spain has several distinct regional systems with varying levels of cultural, economic, and technological development. Madrid, Catalonia, Navarre, and the Basque Country excel in all aspects related to knowledge generation, R&D-focused businesses, universities, and innovative firms. The remaining regions belong to two distinct groups: moderate innovators (Galicia, Asturias, Cantabria, Castilla y León, Aragón, Murcia, Comunidad Valenciana) and emerging innovators (Castilla La Mancha, Extremadura, Islas Baleares, Andalucía, Canarias) (European Commission 2021).

In Spain, 93.9% of the population between the ages of 16 and 74 years use the internet, and 2021 marked the first time that internet usage surpassed

television consumption in terms of audience penetration, with magazines (26%) and newspapers (13.8%) trailing. Trust in news remains low, and emerging habits include a rise in online news subscriptions and podcast listeners (Newman et al. 2022; PwC, 2023). The evolution of Spain's media industry has been marked by a series of major changes that have transformed the landscape over time. During the Francoist regime, there was free enterprise in the written press, a concession system for radio (concomitant with state radio), and a state monopoly in television. The elimination of the state monopoly on broadcasting in the 1980s led to the commercialization of radio and television, resulting in the creation of numerous channels on national, regional, and local levels (Artero-Muñoz et al. 2021).

One of the most significant developments in the 1990s was the emergence of new media groups driven by mergers, acquisitions, horizontal expansions of newspaper chains, and vertical integrations of television and editorial groups. The Media Pluralism Monitor (2021) proves this area is at high risk due to the cross-media concentration of ownership and competition. Although media law provides ownership restrictions in the sector, specific cross-media concentration limits are not established. From a national market perspective, newspapers, magazines, and broadcast media form part of a broad oligopoly, made up of approximately ten competitors in each industry, which has been fairly stable over the years (*Planeta, Prisa, Vocento, Unidad Editorial, Mediaset, RTVE, Cope, Prensa Ibérica, Godó, and Henneo*). Another key aspect of this evolution is the gradual decline of the public sector's influence on news outlets (Artero-Muñoz et al. 2021).

The Spanish media system's economic weakness in comparison with other European countries can also be seen in the public innovation framework. Although the creation of the Ministry of Science and Technology in 2000 aimed to modernize public administration, the evidence does not support this as an example of adapting to EU governance. The Ministry consolidated competences and resources, but its overarching National R&D Plan did not resemble EU program operations (Cruz-Castro and Sanz Menéndez 2022). This is reflected in Spain's relatively low Global Innovation Index (GII) compared with its European neighbors (WIPO 2022). Spain's performance in 2022 shows an improvement compared with previous years because it produces more innovative outputs relative to its level of investments, but it is ranked 18 out of 39 European economies. The GII shows the country's innovation performance relative to GDP is in line with its level of development.

Lastly, another negative key factor for innovation is the entrepreneurial environment in Spain, which experienced a severe collapse in 2021 when it was ranked 41 out of 51 economies (GEM 2023). COVID caused a significant disruption in business operations, clearly impacting both the commercial productivity of companies and the nation's entrepreneurial endeavors. The most noteworthy decreases in the Global Entrepreneurship Monitor scores were found in government policies for entrepreneurial programs and support, as well as excessive taxation and bureaucracy.

Media system, policy, and innovation framework

Spain's relatively young democracy has played a decisive role in shaping its media landscape. Following the institutional transformations driven by the adoption of the 1978 Spanish Constitution, the country has witnessed the dramatic evolution of its media system as it consolidates its parliamentary democracy and adopts European media regulations (Llorens and Muñoz-Saldaña 2023). The 2008 financial crisis led to political instability and the fragmentation of political parties in Parliament. A progressive coalition led by PSOE, Podemos, and various nationalist parties has been leading the government since 2019, although the far-right party VOX is gaining strength and contributing to a growing polarization in the country.

The Spanish media structure is defined by a highly polarized system with strong political parallelism, described as the typical Mediterranean model of southern Europe (Hallin and Mancini 2004). Indeed, Hallin and Mancini argue, “[T]he capacity of the state to intervene effectively is often limited by a lack of resources, lack of political consensus, and clientelist relationships that diminish its capacity for unified action” (2004, 119). Government action in the media sector has primarily been limited to a controlled public broadcasting system (*RTVE*), with minimal support for innovation in journalism, adding significant challenges for media organizations that seek to innovate and engage with audiences. The most relevant change in recent history for *RTVE* was the new financing law of the *RTVE* Corporation, which was passed in August 2009 and ended the state public television's advertising income.

Direct press subsidies that began in the 1980s have survived only in some of Spain's regions, where they are usually justified on the basis of promoting the local language (particularly in Catalonia and the Basque Country). The recipients have primarily been regional and local newspapers that promote their local languages. The lack of transparency and political advertising has created an uneven playing field for media organizations, further undermining trust in news sources (Fernández Alonso and Blasco Gil 2014). The over-politicization of the press differentiated Spain's media system from its Western European counterparts (Papatheodorou and Machin 2003; Hallin and Mancini 2004; de la Sierra et al. 2012).

The evolution of Spanish policy in science, technology, and innovation over the last decade has been closely tied to the global economic crisis (Cruz-Castro and Sanz Menéndez 2022). Despite increased public intervention in innovation policies, the decline in R&D expenditures has led to fewer “innovative enterprises” and a continued low level of business contribution to R&D. According to OECD data, Spain is not one of the top spenders on R&D in Europe based on the percentage of GDP. Compared with other European nations, Spain holds a mid-tier position (1.429%).

The Science Law (Law 13/1986) was enacted in 1986 to address Spain's lack of stimuli for scientific activity led to the creation of the National Plan

for Scientific Research and Technological Development, which did stimulate research activity. Communication and journalism research was initially overlooked due to the absence of a specific program, but this changed in 2010 when the topic became a separate discipline within Social Sciences. As a result, the number of funded communication science projects increased, with the mean number of projects per call rising from 14 (2004–2009) to 25 (2010–2017) (Martínez Nicolás 2020). The growing amount of research on innovation in journalism highlights the importance of the industry and its rapid changes (Carvajal et al. 2022).

The absence of considerable subsidies and public allocations for media innovations poses a major challenge for Spain's media system (de la Sierra et al. 2012). The Spanish government has never viewed digital newspapers as equal recipients of aid and institutional advertising as traditional print newspapers, despite failing to provide solid reasoning. This media policy decision distorts the information market and slows industry transformation by being unhelpful concerning the inclusion of new players (Manfredi Sánchez et al. 2019).¹

At the same time, Spain's institutional framework has not prioritized media literacy development, leaving citizens ill-equipped to navigate the complex, polarized media landscape (Vidal et al. 2017; Sádaba Chalezquer and Salaverría 2023). The lack of comprehensive media education programs has hampered the public's ability to discern reliable news sources and think critically, weakening the potential audience for innovative journalism and hindering the expansion of a sustainable media ecosystem.

The great exception to this lack of general investment in media innovation is the case of the innovation laboratory at *RTVE*, the largest audiovisual group in Spain and the public broadcasting corporation. In 2007, *RTVE* restructured its business strategy to create an interactive media division that promotes digital and participatory development initiatives for in-house productions. As a state-owned company, *RTVE* is committed to quality, innovation, and public service, investing its financial, technical, and human resources in new technologies (Zaragoza-Fuster and García-Avilés 2019). The laboratory is one of the main sources of innovation within public service media and can become a catalyst for the change required by public corporations (Zaragoza-Fuster and García-Avilés 2022).

Media industry: corporate performance

The shift toward digital media has defined the evolution of the media industry (Carvajal et al. 2022; Salaverría and Martínez-Costa 2023). As new digital native media groups have emerged, they have challenged traditional media players and reshaped the way information is produced, distributed, and consumed. This shift has had far-reaching implications by prompting traditional and new media groups to adapt to the changing landscape and cater to the evolving needs and preferences of their audiences (Artero-Muñoz et al. 2021).

The 2008 financial crisis, coupled with a lack of media policy to foster sustainability and innovation in journalism, resulted in a shortsighted and defensive strategy approach by legacy media (García-Santamaría and Pérez-Serrano 2020). The performance of Spain's media groups was already impacted by several structural challenges, such as low newspaper penetration and readership rates. Fifteen years ago, the penetration of print newspapers among Spaniards was 41%, and in 2023, it was just 13.8%: a sharp accumulated drop of more than 8.6 million readers since the beginning of the industry crisis in 2008 (AIMC 2021). Or in circulation figures from the 4,000,000 daily issues in 2008 to the 885,000 in January 2023, an almost 80% loss. The crisis led to a significant drop in traditional advertising revenue due to financial instability and shifts in consumption patterns (Vara-Miguel et al. 2021).

The media conglomerates that emerged from the crisis are starkly different, especially financially, from 20th-century groups. This has led to a historic loss of opportunity in embracing digital innovation that new entrants and rivals have capitalized on (De-Lara-González et al. 2015; Negredo et al. 2020). Legacy newspapers such as *El País* and *El Mundo*, along with regional groups like *Vocento*, *Prensa Iberica*, and *Godó*, now have counterparts in the form of thriving digital outlets that include *El Confidencial*, *Eldiario.es* (González-Esteban 2014), and *El Español*.

Newsrooms in Spain, like *El Mundo*, began the process of multimedia integration at the end of the 2000s (García-Avilés et al. 2014). During that key era, and despite facing structural and financial challenges, legacy media organizations maintained a slightly paternalistic view of native digital journalism in Spain, as if it were a lesser industry (Manfredi Sánchez, Juan Luis, Ufarte Ruiz and Herranz de la Casa 2019). Up until 2017, the Spanish Newspaper Publishers' Association had not opened its doors to other media outlets, including paid, digital native, or print. The creation of the Information Media Association (AMI in Spanish) to replace the Spanish Newspaper Publishers' Association (AEDE in Spanish), which was founded in 1977, reflects the business vision of the new competitive environment (Manfredi et al. 2019).

The COVID pandemic further exacerbated the already devastated landscape, but media companies recovered slightly in 2021, albeit without reaching pre-pandemic revenue levels (European University Institute et al. 2022). During the pandemic, newsrooms embraced new ideas, and management used its leadership to promote primarily incremental innovations in content production, editorial organization, distribution, and commercialization. COVID-19 also led to the rise of data journalism (see Chapter 10) due to the vast amount of data and the audience's preference for hard news.

Spanish publishers accelerated their pivot to subscription and membership models (see Chapters 14 and 24) (Vara-Miguel et al. 2021). The payment concept has been widely adopted and became consolidated in 2022, allowing readers to access the news they are most interested in (among the top, *El País*, with more than 220,000 subscribers, and *El Mundo*, with over 100,000). On the other hand, the cost of printing has risen rapidly, resulting in higher

newspaper prices and energy costs for printing facilities. Some newspapers have switched to alternative types of paper and reduced their print sizes to save costs (PwC 2023).

The changing business models for subscriptions and memberships have driven new practices in newsrooms, moving toward a greater focus on innovation and a shift in the editorial mindset. This shift can be seen primarily in the predominance of digital products over print versions, in the effort to create better digital stories with greater depth and narrative quality, and in the launch of newsletters and podcasts to engage with digital subscribers. A significant part of this innovative impulse has come from news outlets created on the internet. Paradoxically, the crisis between 2008 and 2013 led to the emergence of a second generation of digital native media in Spain (Negredo et al. 2020). These projects were often carried out by experienced journalists who had been fired or had walked away from their jobs at media companies (De-Lara-González et al. 2015). However, one of the characteristics of native media is the economic fragility and difficulty in consolidating sustainable models in the medium and long term (Buschow 2020; Vara-Miguel et al. 2021).

Another key factor is the recognition and encouragement of innovation through awards and distinctions. New awards, like the Vicente Verdú of Innovation in Journalism (granted by the City Council of Elche, Asociación de Informadores de Elche and Miguel Hernández University), are also paving the way to incentivize new storytelling approaches in the workplace.

Professionals

It's difficult to know the exact number of journalists employed in Spain. The latest available data is provided by the APM (2021) report, which states that there are approximately 30,000 professionals employed by media companies. This data neither includes freelance professionals nor those who work in communication departments and in press roles for public administrations. The current media scenario for professionals in Spain is the outcome of the profound economic crisis that resulted in the elimination of more than 12,000 jobs between 2008 and 2015 but also incentivized media innovations and the creation of more than 500 news start-ups (Negredo et al. 2020). Digital media saw its most significant growth during the toughest economic times: the number of digital media sites rose faster than at any other time before or since, at least in absolute terms (Salaverría and Martínez-Costa 2023). The Great Recession, which had a destructive impact on large media companies, prompted not only a shift from traditional to emerging media but also a relocation of professionals within the industry. Consequently, many of today's leading digital native media outlets are helmed by former traditional media professionals (Salaverría and Martínez-Costa 2023).

The number of self-employed individuals jumped from 11.5% of the news workforce in 2005 to 31% in 2020 (APM 2005, 2021). However, the overall

working conditions for journalists in Spain deteriorated in the 2010s. Unemployment, job insecurity, and low salaries are viewed as the profession's main issues, all of which pose serious threats to journalists' freedom of expression and independence.

On a positive note, the media industry's digital transformation has given rise to new hybrid roles at the junctures of journalism, technology, and business. Professionals with skills in data analysis, audience development, multimedia storytelling, and other emerging fields have become increasingly valuable in newsrooms (Valero-Pastor and González-Alba 2018; Carvajal and Barinagarrementeria 2021; Valero-Pastor et al. 2021; Humanes et al. 2023). These individuals often serve as catalysts for innovation, driving the adoption of new technologies and practices to enhance journalism's quality and importance in Spain.

As the traditional media landscape has faced ongoing challenges, some journalists in Spain have developed an entrepreneurial mindset, seeking opportunities to create their own media ventures or freelance careers (Casero-Ripollés 2016; Barranquero Carretero and Sánchez Moncada 2018). This shift has fostered a spirit of innovation among professionals, who are now more willing to experiment with new storytelling formats, platforms, and revenue models. The rise of digital natives and independent media outlets has further fueled this entrepreneurial spirit, creating a more diverse and vibrant media ecosystem (Valero-Pastor et al. 2021).

The rapidly changing media environment has encouraged a trial-and-error mentality among Spanish journalists as they acknowledge that some innovations will not succeed and that learning from failures is an essential part of the innovation process. This mindset has led to a more dynamic and experimental approach to journalism, with professionals increasingly willing to test new ideas, iterate on them, and share their experiences with others in the industry (Valero-Pastor et al. 2019).

A growing number of Spanish media professionals are also embracing an open and collaborative innovation culture, recognizing that partnerships and knowledge sharing can help drive innovation in journalism (Valero-Pastor and González-Alba 2018; Rojas-Torrijos et al. 2020; Pallares and Serrano 2022). This collaborative approach has fostered the growth of cross-disciplinary teams, joint projects between media outlets, and the establishment of innovation labs and incubators that serve as hubs for experimentation and learning (García-Avilés 2018).

Despite these positive developments, Spanish media professionals still face several challenges that can hinder innovation in journalism. In general, Spanish journalists describe a "substantive deterioration in the working conditions of the profession, particularly due to an increase in the average [number of] working hours" (Berganza and Herrero Jiménez 2016). Other media professionals draw a similar picture. Spanish freelancers tend to have lower job satisfaction compared with their peers in other countries, likely due to low income and weak professionalization (Marín-Sanchiz et al. 2021).

As journalists are increasingly required to master multiple skills and manage various responsibilities, this can lead to burnout and hamper the development of innovative projects that require time and focus. Some describe symptoms that can be linked to mental health issues, such as stress, insomnia, and anxiety attacks (APM 2022).

Cultural resistance in legacy newsrooms, particularly among older journalists and managers, can slow down the adoption of new technologies and practices. Normative debates about the appropriate balance between innovation and traditional journalistic values can also stifle progress and create friction within news organizations. Most Spanish journalists described greater audience involvement in news production, pressure toward sensational news, and audience research (Berganza and Herrero Jiménez 2016).

Additionally, the Spanish media industry has struggled to retain talent and recruit skilled professionals. Beyond unemployment levels, salaries and working hours are not viewed positively in Spain. According to data from APM (2022), among journalism and communication professionals, this year has been marked by a slight worsening for the former and an improvement for the latter. The percentage of journalists with a monthly net income below 1,500 Euros per month has risen to 34%. The lowest salary levels for employees and freelancers have decreased. The monthly net income for 30% of freelancers in both specialties is less than 1,000 euros.

The precarious employment conditions and the low salaries that prevail in the sector can discourage talented individuals from pursuing careers in journalism, thereby limiting the pool of innovative thinkers available to drive change in the industry. Furthermore, it is important to consider that the journalism profession in Spain is defined by limited regulations and numerous shortcomings in self-regulation mechanisms (Marín-Sanchiz and González-Esteban 2021).

From the education perspective, amid great economic uncertainty, scholars claimed that it was necessary to “develop educational proposals that enhance competencies and mechanisms to promote the entrepreneurial spirit as a professional option among future journalists” (Casero-Ripollés and Cullell-March 2013). Initiatives such as the Master’s Program for Innovation in Journalism (Miguel Hernández University, Elche) and the Master’s in Communication and Digital Entrepreneurship (Universidad Europea de Madrid) are examples of this type of approach (Marín-Sanchiz and González-Esteban 2021).

Conclusion

This chapter analyzes the framework conditions for journalism innovation in Spain. On a macro and historical level, Spain’s media system has been shaped by a young democracy, a lack of institutional support for innovation, and a severe economic crisis. Direct subsidies have only been allocated to local and regional media outlets, with a lack of transparency. The country’s low press penetration and media literacy rates have also historically hurt media development in Spain.

Before the advancement of the internet and social media, Spain's booming media industry boasted high advertising expenditures and the resulting profitability ratios for print, TV, and radio. Many legacy media outlets have struggled since 2010 due to the 2008 financial crisis and the 2020 COVID-19 pandemic. The financial pressures faced by Spain's media industry over the past 15 years have led to widespread job cuts and precarious employment conditions for journalists. This has had positive and negative consequences for journalism innovation in Spain. On the one hand, entrepreneurial journalism has led to the emergence of new media outlets, often focused on niche topics or innovative storytelling formats, with the potential to bring fresh perspectives to the industry. On the other hand, precarious employment conditions can hinder innovation by creating a risk-averse culture and work overload.

Several encouraging trends for supporting innovation in journalism have emerged during the last decade, despite precariousness and tensions inherited after several crises affecting newsrooms and freelancers. These include the rise of new hybrid roles at newsroom junctures, increased entrepreneurial thinking among journalists, and the development of an open, collaborative innovation culture that embraces a trial-and-error mentality. Occasionally, even these collaborative endeavors are more the result of economic constraints rather than a pure drive for innovation. Nevertheless, challenges continue to persist, including cultural resistance in legacy newsrooms, normative debates surrounding the adoption of innovation, and work overload following the COVID-19 pandemic.

Future research could explore how policy measures such as subsidies, tax incentives, and public-private partnerships could impact the growth and sustainability of innovative journalism practices in the country. It would also be interesting to examine the effectiveness of other types of networks and innovation hubs (e.g., co-working spaces, incubators, and accelerators) in driving innovation in journalism and fostering a vibrant media ecosystem. Given the low levels of media literacy in Spain, future studies could investigate the potential of media literacy programs in schools and communities to enhance society's appreciation for, and engagement with, innovative journalism, as well as its ability to discern reliable news sources.

Note

- 1 In 2014, Spain implemented reforms to their copyright laws in an attempt to force *Google* and other digital providers to pay for using copyrighted content from newspaper publishers. In November 2021, *Google* confirmed that it would reinstate its service in Spain in 2022 following the new Royal Decree (24/2021) approved by the government, which adapts the European directive on copyright. This allows publishers and rights-holders to manage their rights individually through direct negotiations with content aggregators or via a voluntary collective management entity (European University Institute et al. 2022).

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