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Neither West nor Third World: the Mexican television industry within the NWICO debate

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In the way the world has turned since the decade of the 1970s when the issues of the New World Information and Communication Order (NWICO) first became articulated, theoretical assumptions and analytical frameworks which seemed appropriate at the time now appear misconceived and unresponsive to present complexities.

More than anything else, the dichotomy between 'the West' and 'the Third World' has broken down. In Europe in particular, the forces of commercialization and new technologies of communication across borders have brought it home that concerns which once seemed remote and exotic are bona fide international issues. The minds of progressive media intellectuals and members of national governments alike now are concentrated in a search for workable policies based on a reappraisal of the relations of force in a world in which gestures of rhetoric sympathetic to the problems of 'cultural imperialism' in the 'Third World' have been made obsolete by the realities they now face themselves.

In particular, the notion can no longer be sustained that 'the West', as a monolithic group of nations headed by the US, is in control of certain international mechanisms, including communication media, with which it ensures that the passive and homogeneous 'Third World' is made to conform to its interests. Apart from the spurious assumption of the homogeneity of the two blocs and the 'instrumentalist' conception of how international influence might work (Martín-Barbero, 1988: 488), we must now also contest such a view for the fallacious presupposition that there is a necessary identity of interests between nation-states and the transnational private corporations which have their roots in them.

This paper examines a case in international communication relations

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which, whilst exceptional, gives some specific substance to these challenges against the former critical orthodoxy. It also seeks to illustrate the value of understanding the dynamics at work between private interests and the state at the level of particular nation-states within a defined geographical or linguistic region, comprehensible nevertheless within a broader structure of dependency.

The case in point is Televisa, the private media conglomerate which dominates the audiovisual industries of its home base in Mexico; which built up and for many years monopolized the Spanish-language television market throughout the US; and which maintains large-scale exports of its programmes as well as certain satellite transmission operations not only to the US and Latin America, but also to other parts of the world, including Europe. Televisa is rivalled only by TV Globo, its counterpart based in Brazil, as the world's biggest television network outside of the US. It is beyond doubt the largest in the linguistic region of Spanish-speaking countries, and Spanish is second only to English as the most widely spoken European language in the world. However, for all its predominance in Mexico and its region, it will be seen that Televisa's activities are conditioned by the movements of capital in the US, and by Mexico's dependent position in the world economic system.

NWICO: the original issues

Even if the issues first posed in the NWICO debate have now broken their original boundaries, there are compelling historical reasons why they first should have arisen in terms of an opposition between 'the West' and 'the Third World'. When it became evident that the policies and ideologies of the 'Development Decade' of the 1960s had failed to fulfil the promise of 'modernization' to Europe's former colonies in Africa and Asia, and that import-substitution industrialization strategies being pursued by several Latin American countries served only to intensify their dependence upon the US, the subordinate nations in these relationships sought to understand why it was that formal political and economic independence was not enough to bring about autonomous national development. Along with a number of critical communication scholars in the West at that time, they argued that it was because imperialism had been transformed rather than transcended, and that its transformation included the incorporation of the sphere of communication and culture. 'Cultural imperialism' became the dominant critical metaphor which characterized the central concerns of the emergent NWICO debate, or as it was formulated by the Heads of State of the Non-Aligned Countries meeting in Algiers in 1973:

It is an established fact that the activities of imperialism are not confined solely

to the political and economic fields but also cover the cultural and social fields . . . the cultural alienation and imported civilization imposed by imperialism and colonialism should be countered . . . so that every people can exercise effective control over all its national wealth and strive for its economic development under conditions ensuring respect for its sovereignty and authenticity . . . (Quoted in Schiller, 1978: 36–7)

In this view, national autonomy was threatened by international communication media in particular. To adopt Boyd-Barrett's classification of the various forms of 'media imperialism', the mechanisms involved the transfer of both technological and structural-organizational systems as well as personnel and content, all with their attendant practices and ideologies (1977).

To take television as the most pertinent case in point, the technological dimension involved Third World importation of television broadcast hardware, with concomitant dependence upon Western sources for investment in infrastructure, training of personnel, equipment innovation and programmes. Structural issues stemmed from the fundamental question of whether the ownership and control of media systems was to be maintained by the state, as in the traditional BBC/ORTF model widely adopted in former British and French colonies in Africa and Asia, or given over to private interests, as in the US commercial model predominant in Latin America, where for a time there was also some direct investment in networks by US corporations. Under both models, but more characteristically the latter, much critical attention was given to a perceived homogenization of values and consumption patterns which could be attributed to television advertising, an industry manifestly dominated by transnational corporations, both as advertisers and as agencies, and for the most part US-based.

However, it was the nature of certain kinds of media contents and the unequal patterns of their 'flow' between nations which generated the most intense and sustained debate. In particular, a strong critique was mounted in defence of the interests of Third World nations against the Western-based news agencies which had come to monopolize the means by which news was defined, produced and distributed throughout the world. The agencies were seen as transnational corporations in their own right, performing ideological functions for their home-base countries through the diffusion of news in the service of national interests (Somavía, 1978). While news became the 'information' component in the emerging demand for NWICO, the 'communication' element was more readily associated with television entertainment, notably with regard to the 'one-way street' along which Western television exports, particularly from the US, travelled to Third World countries (Nordenstreng and Varis, 1974).

Yet as with news, it was the perceived ideological impact of television entertainment content as much as its market dominance which motivated

Third World countries to mount their concerted push in the forum of Unesco against the US-supported 'free flow of information' doctrine in favour of 'a free and balanced flow' (McPhail, 1981). About the same time, Latin American countries in particular resolved to defend their cultural sovereignty through the development of national communication policies (Fox, 1988). Both moves were represented by their opponents as threats to media independence and freedom of expression, but also at stake were the laissez-faire market conditions enjoyed by Western media interests, and as well, by their counterparts and allies in the Third World.

For at this stage of the debate, it already was becoming evident that the polarity 'West/Third World' was no more than a loose descriptive construction unable to take account of the alliances and intermediate interests, quite readily revealed by specific empirical and historical analysis, through which communication and cultural influence penetrated various countries and regions. When Jeremy Tunstall's detailed and considered overview of world media, *The Media Are American* appeared in 1977, for example, the assertion of its title was attenuated by its recognition of the 'entrepôt and export role' played in certain regional centres. Notable amongst them was Mexico City, where under the Televisa corporate umbrella, indigenous media entrepreneurs not only relayed US programmes on to the Latin American market dubbed into Mexican Spanish, but also supplied the export markets which they had developed in both the US and Latin America for their own 'hybrid' media products, notably the Latinized soap opera, the *telenovela* (182–4). A new era had arrived.

NWICO in the internationalized era

To struggle to make oneself independent of a colonial power in a head-on combat with a geographically defined power is very different from struggling for one's own identity inside a transnational system which is diffuse, complexly interrelated and interpenetrated. (García Canclini, quoted by Martín-Barbero, 1988: 452)

Whereas the original NWICO debate rested on a conception of one group of nation-states developing strategies to resist compromising influences from the free-booting agents of another group of nation-states, led by one in particular, the issues now are being redefined in a way which demands that such 'nation-bound' analyses be transcended by a more complex perspective. It has become necessary not only to make empirical differentiation between regions and between nations within the respective entities of West/Third World, but also to distinguish the relations of force within each nation and their specific international connections. At the same time there is a corresponding need for theory to climb down to lower

levels of abstraction and less sloganized formulations, but not to lose sight of the complex interpenetration of national and international interests in forming patterns of domination. In particular, private interests need to be distinguished from the interests of the state in an era in which the power of the state is diminished in the face of the transnational corporation, whether domestic or foreign, and the relationship of public to private is itself in a process of redefinition.

The 'internationalist' perspective discernible in the recent work of Armand and Michele Mattelart and their collaborators may be seen to go some way towards addressing these new priorities. While some unresolved contradictions and past excesses are glossed over, Nicholas Garnham has spelled out certain characteristics derived from their work which together may be taken as the desiderata of an analytic framework appropriate to the current era. In essence, international cultural influence is seen as an economic, technological, political and ideological phenomenon, but not reducible to the simple determinism of any of these sets of factors: indeed, they are conceived as contradictory forces which may generate popular resistance at the cultural level. Rather than the Althusserian doctrine of the primacy of the state's ideological functions, the Mattelarts now take account of the effectivity and variety of social forces in 'civil society', and their historical contingency in each country, for 'cultural, like economic imperialism, works through the specificities of the local power structure'. They similarly reject Manichean 'Third Worldism' and 'cultural anti-Americanism' (Garnham, 1984: 4-6). Their approach is empirical but sceptical, progressive but not dogmatic, and serves as a useful guide to the global trends towards which theory and research now must address themselves.

In establishing differentiation within the categories West/Third World, the Mattelarts point to the decline in the economic dominance of the US and Britain relative to the rise of Japan and West Germany. They further note that although 'newly industrialized countries' like Mexico and Brazil are now home to a number of 'multinationals of the Third World', including the 'international multimedia groups' Televisa and TV Globo, these are precisely the countries where development and economic integration have been conditioned by dependence in the form of massive indebtedness to foreign private banks (Mattelart et al., 1984: 51-7). Thus, the mode in which nations are inserted into the world economy still is fundamental to an understanding of their cultural influence, but in variable and complex ways.

The international distribution of language usage is an obvious though infrequently remarked upon dimension of world patterns of media influence, important for example in accounting for the rise of regional production centres in film markets: Hong Kong for Mandarin, India for Hindi and Egypt for Arabic — 'the Moslem Mexico' (Tunstall, 1977: 237).

The Mattelarts have given their attention to the language region question in their investigation of a proposal for 'cooperation between countries with a language of Latin origin' which sought to open up a 'Latin audiovisual space' (1984: ix). However, their analysis is alert to the ways in which such a drive towards 'cultural identity', once the unquestioned purpose of the struggle against 'cultural imperialism', now may be seen as ideological legitimization for the protection of vested 'national' interests — state or private, domestic or transnational — and attempts by such interests to establish their own hegemonic images of 'the nation', or to build up alternative cultural empires for themselves (17–18). Certainly Televisa and TV Globo have exploited the comparative advantage of their respective positions within the major world regions where Spanish and Portuguese are spoken, and which now form the basis for their cultivation of other 'Latin' regions as markets.

Other substantive changes now to be found in the world communication environment are more technological, notably the development and profusion of both international and national communication satellite systems. This has taken NWICO concerns beyond matters of broadcast frequency allocation and teledetection surveillance (Mattelart et al., 1984: 10) to confrontation with questions of the allocation of satellite orbital positions for all nations that may want them, and the defence of national territory against foreign satellite transmissions. Of course, these are also questions of ownership and control. It will become evident below that in the development of its international markets, Televisa has been an active innovator in adopting satellite and other new television technologies, and in particular has had a convoluted role in the establishment of the world's first privately-owned international satellite system. Within Mexico, Televisa has manoeuvred itself so as to receive the benefit of the state's technological initiatives. As Emile McAnany has observed, the question of foreign versus domestic ownership and control of the 'cultural industries' has turned out to be much less formative of patterns of international media development than the implantation of the model in terms of which cultural industrialization has proceeded: that is, the question of 'public' or 'private' (1984: 194–5).

Finally, a new international perspective is called for to take account of notable shifts in those areas where, in the past, domination by Western and particularly US interests seemed most impregnable: advertising and the export of television programmes. In the advertising industry, advertisers and their agencies are becoming more concentrated but truly transnational in their ownership and more dispersed in their operations, as homogeneous global campaigns give way to 'multidomestic' strategies and 'multicultural' joint ventures addressed to specific national markets (Sinclair, 1987). Of more immediate concern in the present context, a major review by Tapio Varis of patterns first observed a decade before in the import and export of

television programmes found 'no clear changes' overall, but noted the exception of 'a trend towards greater regional exchanges', including the Latin American region, and remarked upon inroads being made into the US domestic market by programmes from Mexico (1984: 143–52).

'A more balanced flow' via 'reverse media imperialism'

However, the elaboration of a new critical internationalist perspective is all the more crucial for the fact that precisely these shifts in international communication patterns have been misrepresented by certain commentators who have rushed to interpret them as a vindication of laissez-faire policies in practice (Rogers and Antola, 1985: 34), and at the level of theory, as a turning point beyond the comprehension not just of 'free flow' but also critical approaches (Schement et al., 1984). Based on their own studies of Televisa and TV Globo's influence upon programme exchanges within Latin America and of Televisa's export activities to the US through its former subsidiary Spanish International Network (SIN), Rogers and Schement claim to find 'a major change toward a more balanced flow' in the first case and "'reverse media imperialism" with a vengeance' in the latter, since it 'represents the largest scale exportation of media products from a Third World nation to an industrialized country' (1984: 160).

For all the significance which now must be accorded to the international expansion of Televisa and TV Globo, this assessment is unsubstantiated hyperbole, a superficial attempt to turn the tables on the 'cultural imperialism' paradigm, but without the depth to recognize the limitations in its problematic. Thus, Rogers and Antola's study of Latin American import and export patterns produces figures to show an overall decline in the proportion of programming imported into the selected countries they study, and offers evidence of audience preferences for *telenovelas* produced domestically or elsewhere in the region, relative to US programmes. They correctly argue that the *telenovela* is an inherently commercial although 'Latinized' genre; they note that Latin American broadcasting operates on a continuous hours model, with time for sale to advertisers, a system which Televisa and TV Globo have exploited to the full with the *telenovela* as their vehicle; they observe that the lower costs of programmes from the region, compared to US programmes, have made them more attractive to Latin networks, and mention that programme barter arrangements are being set up to obviate foreign currency exchanges (1985).

However, as with the 'cultural imperialism' theorists whom they would seek to refute, what they do not see is that the most consequential factor in international communication influence was never so much the foreign source of programmes as the institutionalization of a model which required

continuous air time to be filled with whatever programmes might attract the size and kind of audiences which could be delivered to advertisers on a cost-effective basis. This is a system which has geared social communication into the whole process of the transnationalization of national economies in one country after another, and indigenous adaptations of the basic model have only naturalized and legitimized its assimilation.

The 'cultural imperialism' approach may have been limited by its dichotomous world-view and mechanistic sense of how cultural influence worked, it may have placed a misjudged importance on the alien character of cultural imports and overestimated their ideological effects, but it was correct in its basic critical perception that communication media were a force for the integration of nation-states into the world economic system. The fact that this turned out to be a much more differentiated and mediated process than anticipated requires that closer attention be given to particular empirical circumstances, but not that the insights of a global perspective and critical stance be abandoned. Indeed, even the 'American hegemony paradigm' of the 1970s was in some formulations more flexible and far-sighted than Schement et al. recall it (1984: 168–9). We have noted in particular that more than a decade ago Tunstall had drawn attention to Televisa's toehold in the US and to the Televisa/TV Globo *telenovela* export phenomenon. He also predicted the expansion of such 'hybrid' genres at a 'middle level' of world media (1977: 273–4). This certainly has happened, but it is a gross exaggeration for Rogers and Antola now to declare that the regional trade in Latin America amounts to 'a major change toward a more balanced flow'. Furthermore, this view of it only reproduces a dichotomous conception of cultural influence which it is time to move beyond.

The notion of 'reverse media imperialism' is even less sustainable for similar reasons. Setting aside the fact of Televisa's recent loss of the hold which it long maintained over the Spanish-speaking sector of the television industry in the US, even in its heyday the undoubtedly massive number of hours and outlets for which Televisa supplied programmes was always negligible relative to the total US industry and its exports. Rogers and Antola's own study shows that Mexico was importing half of its programming in 1982, the same proportion as when Televisa was first incorporated a decade earlier (1985: 25). By contrast, the US, which is where most of the imports to Mexico come from, remained enormous but self-contained, almost hermetic as a market: according to Varis, scarcely 2 percent of the broadcast hours measured in the US in his 1983 study were imported. Programmes from Mexico (specifically from Televisa) and England together constituted just under half of all imports, with 30 percent and 21 percent coming from other Latin American and European nations respectively (1986: 58–9). In other words, Televisa's supply of programmes to its entire US network amounted to less than half of one percent of total

US broadcast time, a minuscule redress of the 'balance', and mediated through what we know now to have been more of a tenuous feudal domain than an 'empire' (Sinclair, 1990).

Televisa and the Mexican state

While the 'reverse media imperialism' thesis can be dismissed largely on empirical grounds, a more fundamental flaw is in the assumed equivalence it makes between the international activities of private corporations and the interests of the governments of the nation-states in which they are based. The Timesque trope 'Mexico's Televisa and Brazil's TV Globo' (Rogers and Antola, 1985: 28) is a 'nationalized' distortion of the transnational character of the contemporary cultural industries, as anachronistic as if we were to speak of 'Britain's Saatchi & Saatchi' or 'Australia's News Corporation'. Rogers and Antola allude to 'favourable government policies' which they say assisted Televisa and TV Globo to become monopolies in their domestic markets and so establish an export base (1985: 27), while Schement et al. assert that Televisa was 'passively encouraged' by the Mexican government in its export activities to the US (1984: 174). What they refer to in these remarks, however, is not government intervention, but its absence: the implied view is that governments serve 'their' private corporations best by providing them with a benign environment free from regulation, the corollary being that private corporations so treated will realize the general interest.

This is an argument at least as old as capitalism, born again in the struggles over privatization and deregulation which many countries are undergoing at present. However, its application to the case of Mexican government policy on communication and its dealings with Televisa is ignorant of a longstanding and involved history in which the state has sought intermittently to assert its cultural hegemony and its political control over mass communication, only to be defeated, compromised or outmanoeuvred at each turn by the private interests in control of Televisa. This history is well-documented and has been accessible in English for some time, so does not need to be retold here (Mahan, 1985; Molina, 1987; Sinclair, 1986). Suffice it to say that Mexican broadcasting became firmly established on the commercial model during the days of radio, and private entrepreneurs co-opted the president of the day, Miguel Alemán Valdés, to ensure that television was introduced on a similar basis, with the minimum of regulation. Belated attempts by subsequent government administrations to assert some control over the content and operation of broadcasting, and when rebuffed, to develop state broadcasting institutions, have only had the effect of consolidating and legitimating the private interests which have become Televisa, a private conglomerate which

dominates every aspect of the television industry and reaches far into other media, entertainment and communication hardware industries. In recent years, particularly since the state moved to nationalize the banks in 1982, Televisa has continued to institutionalize itself as the 'fifth estate' in Mexican society and as guardian of the national culture by opening up a non-commercial cultural channel and cultivating various links with formal education and the arts (Trejo Delarbre, 1987). However, it will be seen that Televisa has become more of a transnational than a 'national' corporation, and as Garnham observes:

To focus too centrally on the State is also to fail to grasp the ways in which the development of the international economy is itself undercutting the role of the nation state. This, in fact, can give rise to a situation in which multinational producers of culture can actually engage in battle with the State for the allegiance of its citizens. (1984: 5)

In the context of NWICO, one aspect of the Mexican state's struggle with Televisa deserves particular comment: the endeavour to implement national communication policies in the wake of the 1976 First Intergovernmental Conference on National Communication Policies sponsored by Unesco in San José, Costa Rica. Although ultimately unsuccessful, Mexico distinguished itself as the only participant even to make the attempt. This followed a period in which the Echeverría presidential administration had threatened the private media owners with legislative reform and initiated the state's own participation in television broadcasting, also on the commercial model: indeed, Televisa was formed at this time as the result of the private interests closing ranks in the face of these challenges. In line with the San José recommendations, the incoming López Portillo administration took a more fundamental approach to the democratization and reform of the media, based on a new constitutional 'right to information'. However, the bill necessary to define and implement the right was never presented because in the ensuing public discussion and congressional hearings, the government was unable, even to its own satisfaction, to reconcile the right to information with the right to freedom of expression, or in a phrase of the time, 'to square the circle'. The initiative was abandoned (Caletti Kaplan, 1988: 74–8).

The experience of the succeeding administration in attempting to assert itself against Televisa also is worth noting here because it demonstrates how private interests can raise the stakes far beyond the jurisdiction of a national government in the current politics of international communication. The de la Madrid administration also came to office with a proposal for constitutional change, but this time the concern was to head off Televisa's moves into domestic satellite development: the constitution was changed to define all satellite communication as a strategic matter under the control of the state. Televisa's response was to deploy its international connections through SIN in the US with the result that in 1984 a subsidiary, PanAmSat,

was granted permission to launch a satellite from the US which would cover not only the US and Mexico, but both continents of the Americas. For this to be granted, it had been necessary for President Reagan to sign a determination that the venture was 'in the national interest' of the US. This remarkable decision may have been explained to some extent when Reagan's former ambassador to Mexico was appointed some little time after to head Televisa's international satellite division (Fernández Christlieb, 1986, 1988: 205). For a number of reasons, the PanAmSat venture since has gone ahead without Televisa's participation, but the fact that this 'Mexican' corporation's international organization gave it the power to circumvent the Mexican government's control in this way is more than just another instance where private interests have conflicted with those of the state at the level of national politics. Rather, it demonstrates that in these times, the sovereignty of the nation-state can be threatened as much by domestically-based as by foreign transnational corporations. The subsequent development of the state's satellite venture, it should be noted, was conditioned by the requirements of commercial television transmission, with Televisa as its major client and beneficiary (Esteinou Madrid, 1988).

Yet it would be misleading to leave the impression that Televisa and the state are mutually exclusive and permanently antagonistic rivals, for the situation is complicated by the fact that the owners of Televisa form a powerful grouping within both the national oligarchy and the ruling party, the Partido Revolucionario Institucional (PRI). This is an immense corporatist structure which has controlled the Mexican State since the 1930s. Televisa is in declared public support of the PRI, and is constantly criticized for the favour which it shows towards the party in the ideological management of news and other programmes, such as its role in the cover-up of the PRI's electoral fraud in the state of Chihuahua in 1986. However, it should be understood that whilst Televisa no doubt has intimate connections with the state via the PRI, the party itself is not homogeneous, and Televisa is allied to its more conservative faction. In another recent instance, Televisa was accused of bias against the Nicaraguan government, thereby contravening the official stance of the PRI and the Mexican state's sponsorship of the Contadora peace plan, and drawing PRI denunciation for attempting to conduct its alternative foreign policy via television (Trejo Delarbre, 1988: 23–39). Thus, the political project of Televisa both on and off the screen is determined by its own class-based ideological positions as well as by the more pragmatic defence and furtherance of its corporate interests.

Televisa at home and away

Televisa's political and cultural influence is commensurate with its economic domination of the Mexican television industry, the basis upon

which it has built itself up into a transnational media conglomerate. Within Mexico, Televisa receives the lion's share of all the money spent on advertising in the country — 70 percent in 1987 (Downer, 1987) — as much an index of television's pre-eminence as an advertising medium as it is of Televisa's competitive advantage over the state network, Imevision, which also relies on advertising revenue. Further, Televisa's profitability from its capacity to attract advertising is strengthened by its control over programme supply. Since the early 1950s when the film and radio entrepreneur Emilio Azcárraga Vidaurreta built a production centre and opened up export markets for the programmes of Televisa's corporate ancestors, and then accelerating throughout the 1960s with the adoption of videotape technology and the benefit of some investment from the US network ABC (Mejía Barquera, 1987: 22–9), there has been a long-term stratagem of production-driven growth vertically integrated with transmission. At present, Televisa transmits 24,500 hours of television per year, 60 percent of which it produces itself, and exports programmes to at least 35 countries (Griffin, 1989).

However, while Televisa's domination of its domestic market has been the bulwark behind its international expansion — programme exports represented only 4 percent of Televisa's business in 1985 (Maza, 1986) — Mexico's dependent position within the world economy, its consequent indebtedness and chronic economic strife have put pressure upon Televisa to increase the scale of its international operations. 'The successive crises have been making for a smaller Mexico and Televisa is not going to run the risk of being diminished along with it', declared Miguel Alemán Velasco when he assumed control of Televisa's domestic activities in 1986, the same time at which Emilio Azcárraga Milmo announced his departure for the US to take personal control over the corporation's international businesses. This represented an urgent reshuffle within Televisa's ruling triumvirate, all sons of the founding fathers of commercial television in Mexico (Trejo Delarbre, 1988: 22–4). In contrast to the former stable conditions of 'dependent development' under which Televisa could shape and stratify domestic television audiences in accordance with its own interests and those of the transnational corporations which predominated amongst its advertisers, Mexico's economic crisis has presented Televisa with unpredictable patterns of advertising expenditure in a market curtailed by austerity measures, inflation and a depressed currency. Correspondingly, earnings in hard currencies from programme exports and other external activities have become much more of a priority (Sinclair, 1987, 1990).

There was a much more immediate stimulus to the corporate reorganization of 1986, however. At the very stage at which Televisa most needed its platform of operations based on SIN in the US, the Federal Communications Commission (FCC) made clear that it was no longer prepared to turn a

blind eye to the extent of Televisa's illegal control of Spanish-language broadcasting in the US, and ordered that SIN divest itself of a series of stations it owned through its associate, the Spanish International Communications Corporation (SICC). This had begun in 1960 as the broadcast arm of SIN, which acted as programme supplier and controller of advertising sales to the stations. Both companies were managed by René Anselmo, *prestanombre* or 'front man' for the Azcárragas, first father then son. Programmes were supplied by Televisa in Mexico through its export arm Protele, and from 1976, transmitted to the SICC stations and affiliates across the country by satellite, thus creating a consolidated market of Spanish speakers which could be sold to an increasing number of interested national, and transnational, advertisers.

However, SIN's continued self-dealing at SICC's expense and the patronal style of its corporate culture opened it up to the FCC investigation and the eventual divestment order. Azcárraga's subsequent personal intervention exacerbated the situation with his attempt to integrate SIN's news service into ECO (Empresa Comunicaciones Orbitales), a new international venture under Televisa's control. The adverse reaction only strengthened the standing of Telemundo, a newly-emerged competitor in the same market sector which SIN/SICC had created for itself in having formed an audience for Spanish-language television in the US. To the extent that SIN/SICC had been built upon the stable supply of Televisa programmes at marginal real cost from Mexico, and also directed from there through 'an agent of foreign control', as the FCC called Anselmo, the network had sought to gloss over national-cultural and other differences amongst Spanish-speakers in the US. Further, it had created resentment as much in its employment practices as in its programming, for it was reputed to favour Mexicans over US-born Hispanics (including Chicanos, or Mexican-Americans). Such insensitivity to the local cultural environment, an ironic echo of Third World complaints about the Western media in the NWICO debate, created an opening for Telemundo with its greater orientation towards actual US Hispanic audiences. Similarly, Azcárraga's cavalier attitude to US broadcast regulations had made SIN/SICC vulnerable to legal intervention, and this came at a time when corporate America was becoming more aware of the commercial attractiveness of Hispanic media and markets. By the end of 1987, it was announced that Hallmark Cards, the bidder which had acquired the SICC stations, also was to buy the remaining part of what had been the SIN programme supply/advertising sales network, by then renamed Univision. This marked the eclipse of private Mexican capital by US industrial and financial capital (Telemundo being owned by Wall Street interests), and the end of whatever there once might have been of Televisa's 'reverse media imperialism' (Sinclair, 1990).

Televisa's new international order

Yet although Televisa has been obliged to surrender its network and broadcast holdings in the US, it continues to develop ventures there in non-broadcast media under the umbrella of its new 'sister' corporation, Univisa, and is co-ordinating these US-based activities with its recent push into Europe. Through Univisa, Televisa has retained its Spanish-language cable television service in the US, Galavision. Until the demise of the broadcast network, this was a minor operation financed by nominated subscription rather than the sale of advertising time, but Univisa since has built it up as a commercial service by converting it to the 'basic' status accessible to cable audiences at large, and selling time to advertisers. In the same process, Galavision has been formed into the basis of a new international operation, Galavision Europe, and integrated into the ECO news service, satellite-beamed from Televisa in Mexico City. Galavision Europe is a 24-hour satellite transmission of US Galavision and Mexican Televisa programmes direct to Spain, where commercial time is sold to advertisers there through a new subsidiary, Iberovisa (Griffin, 1989; *Variety*, 1989a). Thus, Televisa has survived its divestment in the US by the development of alternative kinds of outlets through which it can transmit its programmes internationally and so form new audiences for sale to advertisers, but at much reduced levels of audience size and profitability.

Univisa also is fostering corporate activities in the field of home video. Its subsidiary Videovisa distributes home videos in the US and Mexico, while the Univisa Industrial Group produces videorecorders and blank tapes for these markets at its plant in the *maquiladora* zone on the US–Mexican border, joining many transnational manufacturers similarly attracted there by trade concessions and cheap labour. The industrial arm is developing telecommunications products also for export from the Mexican side, while other US-based subsidiaries are in record promotion and telemarketing. In Spain, another subsidiary duplicates tapes for the home video market there (Univisa, 1987; *Variety*, 1989b).

As for Televisa's mainstay in programme exports, Latin America still remains the major market — its international television programme sales and film distribution arm Protele reported that in 1988 'about half' its revenue came from Latin America. A further 21 percent came from the US Spanish-language market where it now sells programmes to independent stations as well as to the Univision and Telemundo networks, even while both of these are engaged in building up their own production efforts. Europe has become more important as an export market, with increased sales made to the 'Latin' nations of France, Italy and Spain in 1988, although it was London where Protele decided to open its first overseas office that year (*Variety*, 1989a).

The fact that Mexico is the largest Spanish-speaking nation in the world

(Strategy Research Corporation, 1987) has long been exploited by Televisa in its drive to establish itself as a regional media power, combined with its geographic location between the American continents. From Mexico City it produces and exports its hybrid cultural products such as the *telenovela* and dubs US programmes for re-export, principally to Spanish-speaking Latin America. Its niche in the US has always been predicated on its capacity to supply programmes cheaply to a 'natural' constituency of Spanish speakers (the sixth largest in the world), which have been connected to Mexico City by increasingly sophisticated means. With its satellite linkages now extending to Spain, the next largest Spanish-speaking country after Mexico, Televisa is seeking to command a region which is as much linguistic as geographical, a 'Latin audiovisual space'.

Yet even with its increased efforts on this international scale, Televisa still has to deal with the consequences of the breakup of SIN/SICC, given that a major competitor subsequently has emerged in the field of satellite services for the Spanish-speaking world. In the course of the divestment, Azcárraga and Anselmo parted on bad terms, and in any case were prohibited by the FCC from having any further business dealings with each other. Anselmo became sole owner of PanAmSat, the private intercontinental satellite initiative referred to above, which at that time was in serious difficulties because Latin American countries had not taken up leases as anticipated (Sinclair, 1990). Since then, however, the satellite itself has been launched, co-ordination established with clients in the major European and Latin American countries, and PanAmSat has become the means by which mainstream US programme suppliers are now able to extend their forays into Spanish-language production for the US market out upon the Spanish-speaking world at large (*Variety*, 1989c). Thus Ted Turner's CNN, which produces the nightly news programme for Telemundo in the US, also transmits its 24-hour CNN news service to Latin America via PanAmSat, and the US sports producer ESPN uses it to feed several countries in the region with fifteen hours a day of sport in Spanish (*Variety*, 1989d, 1989e). In addition to these satellite-borne competitors, Televisa is experiencing international competition from both Univision and Telemundo as they develop export markets for an expanding range of their own US productions in Spanish, and for Spanish-language versions of US staples supplied to them under contract, such as MTV International (Lenti, 1989). In these ways, Televisa's rout within the US has opened up challenges to its hold upon the Latin American region as well.

Conclusion

The case of Televisa's strategic responses to its changing fortunes both within Mexico and in the international sphere carries some clear

implications for the redefinition of the terms in which the NWICO debate has been cast. While it remains essential that questions of international cultural influence be seen within a critical perspective and global scope, analysis can no longer assume that the world is divided into two mutually distinct blocs of nation-states maintained in an unequal balance of arch manipulators over noble victims, and still less that any given nation-state forms a cohesive and discrete unity. In particular, the potential for antagonism between the interests of the state and those of a private corporation rooted in the nation, even when it is a subordinate nation, are clearly indicated in the case of Mexico and Televisa. Their relationship demonstrates that theory has to take account of the capacity of private interests to mobilize their resources both inside and outside the country in order to defeat the will of the state.

However, it must also be recognized that Televisa's moves in response to the pressures of the FCC divestment order and the emergence of US corporate competition makes clear that its strategies are conditioned by what is more than ever a marginal position within the US television industry, and in the broader international sphere, by Mexico's dependent position within the world economic system. So long as the Mexican and other Latin American economies remain in crisis, there is a strong motivation for Televisa to seek to cultivate the media industries still open to it in the US, to capitalize upon the burgeoning commercialization of media markets in Spain and elsewhere in Europe, and generally to maximize exports so as to take advantage of its strong production base and the low costs of its domestic market.

The world information order has grown out of historical patterns of colonialism and neocolonial spheres of influence which related 'the West' to the 'Third World'. In particular, the private broadcast networks and film and television export corporations based in the US have been able to dominate the flows of programmes throughout the world not only because of the market power derived from the size and strength of their domestic market but also because of the international economic influence of US-based transnational corporations and the political power of the US as a nation-state. The predominance which Televisa has attained within the geographical and linguistic region of the Spanish-speaking world likewise is attributable to the size and strength of its domestic market, but as well to the unique position it occupies within Mexico's socioeconomic and political structures, and with special regard to the state. While Mexico as a nation-state has some relative prestige and strength as an economic and political power within its region, the region itself remains subordinate and dependent within the world as a system, and Televisa's activities ultimately have been determined by this. So far as its subsidiaries in the US are concerned, it has been shown how these have had to be conducted subject to the moves of corporate capital interests and the regulatory system of the

state in the US. The case of Televisa demonstrates that while the weight of regional media powers should not be underestimated in the new world information and communication order, neither should they be overestimated, but taken in the fullness of their particular complexities.

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