



POLITICAL ECONOMY, COMMUNICATION AND KNOWLEDGE

A Latin American Perspective

edited by César Bolaño, Guillermo Mastrini,
and Francisco Sierra

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Political Economy, Communication and Knowledge

A Latin American Perspective

edited by

Cesar Bolaño
Guillermo Mastrini
Francisco Sierra

co-translator

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Preface

Armand Mattelart

The 1960s and 1970s witnessed the breaking off of the functionalist sociology of the mass media prevailing until then in Latin America. Demystification of the diffusion model, the appearance of new topics like education, participation and the popular social classes, ideological interpretations of the media texts, analysis of the power structures, all challenging communication policies: There was a wide range of opinions, places, and methods for creating a theory and a critical practice as an alternative to the prevailing paradigm. This could even be considered one of the distinctive features of the formation of critical approaches in the Latin American subcontinent. It was a distinctive feature if compared with what was happening in France, home to the linguistic-structuralist theories par excellence, where most of the critical analysis of the mass media focused on texts, disregarding the sender structures and the receivers, and completely ignoring cross-border relationships. It was also distinctive when compared with what was happening in the United States, where the first investigations mainly focused on the military-industrial-media complex of the "American Empire."

In sharp contrast with this, one of the early merits of the first generation of critical investigation in Latin America was, for instance, its attempt not to dissociate the analysis from national and supranational power structures, ideological processes, the creation of a pedagogy of the oppressed, and the formulation of answers to the projects of the dominant classes. The emergence of the "cultural imperialism" paradigm, for instance, coexisted with the issue of "giving the voice back to the people," which was the beginning of a reflection on communication and its relationship with participatory democracy. It should be noted, however, that the cultural imperialism paradigm was later on caricatured

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Pan-American Audiovisual Integration and the Shrinking Latin American Cinema Industry: Market Fatality or Policy Alternative?

Enrique E. Sánchez Ruiz

Whether or not Latin American countries may be able to possess expressive capabilities—and industrial competence—in the audiovisual field is a matter of their people and governments assuming the political stance and will to support and sustain such a capacity, and their right to own an audiovisual industry. Throughout the 20th century, history shows that the foundation of a productive and competitive audiovisual sector is an established motion picture industry. The film industry is the main source of the audiovisual stories that circulated throughout the world during the 20th century. That includes much of TV programming (and, of course, the "video" audiovisual outlets, such as VHS and more recently DVDs). In essence, cinema continues to be, as a social institution, a privileged vehicle for people to tell ourselves, and to tell others, who we are, and how we are, how we want to be, what makes us unique, how we are multiple and diverse, what universal aspects we share with other peoples, and so on. Cinema continues to be a key sector of the contemporary cultural industries (CIs), even with the changes that digital technologies are introducing as expressive mediations, with the new distribution platforms for audiovisual stories. In the presence of the so-called digital (or technological) convergence process among information technologies, telecommunications, and the CIs, one can think that the basis for the

development of a "contents" sector is a consolidated audiovisual industry. And, again, a vigorous film industry is usually the core of a broader sound audiovisual industry.

The great problem is that in our contemporary world a single country not only concentrates the capability to tell us all its own stories, but also the ability to tell us all in the rest of the planet *how we are*, departing from their own stereotypes of ourselves and from their ethnocentric views of the world (Bensusan, 1997; Berg, 2002; Cano, Zertuche, Martínez, & Velásquez, 2003; Freire-Mederos, 2005; Subervi-Vélez & Flores-Gutiérrez, 2002). It happens that, notwithstanding that Hollywood constitutes a magnet to which many talents from the whole world migrate, people find work there that they often do not find in their own home countries ("Exitosa invasión latina en Hollywood," 1997; "Latinos en la industria," 2001; Smith, 2005). Sadly, many of those who migrate to Hollywood, especially actors and actresses, frequently are required to characterize their cultures of origin in a stereotypical and caricaturized way, of which Carmen Miranda's elaborate exotic image of Brazilian women was just a token.¹ The major U.S. film companies argue that their world supremacy was the product of the wonderful operation of "market forces," offer and demand, in "wise" interaction. We have argued—and documented—the planetary hegemony of the American audiovisual industry:

It is a product neither of "market forces" that work in a miraculous way in favor of Hollywood and their oligopolies, nor of an apparent "manifest destiny" handed over to the United States by some deity. Rather, it is the result of a complex historical process, to which numerous factors contributed, among them, an active participation of the U.S. government in diverse conjunctures, besides a sort of "nongovernment protectionism" that has originated from a highly concentrated market structure, among other factors. (Sánchez-Ruiz, 2003b, p. 7)²

Historical research shows that at different times and in multiple ways, the U.S. government has supported the development of external markets for the motion picture industry, especially through actions of the Department of Commerce, and the State Department (Bjork, 2000; Guback, 1969; Sánchez-Ruiz, 2003b). Besides the aid in research, commercial support, and diplomatic pressures on foreign governments, including in some conjunctures the provision of direct subsidies, the U.S. government allowed the major film companies to gather in an export cartel, thus breaking the "competitive market laws," by operating as a monopoly in the international markets (Guback, 1969). Now that they are totally sure of their domination of world markets, which—again—was not historical-

ly achieved by virtue of any "invisible hand" of unfettered market forces, the U.S. government and that country's entertainment corporations demand free-market operation. So, for example, in March 2003 the Entertainment Industry Coalition for Free Trade (EIC, 2003) was formed. It includes the major firms of the motion picture industry, as well as other CIs, such as music and television, and the trade associations and guilds of diverse branches of the entertainment industries ("Actors, directors," 2003). This coalition was apparently formed under the leadership of the Motion Picture Association of America (MPAA). The coalition's main goal is "to educate key policymakers about the importance of free trade, the positive economic impact international trade has on the entertainment community, and how international trade negotiations help to lay the groundwork for strong intellectual property protections" (EIC, 2003). It is quite paradoxical that they defend "free trade" from a position of oligopolistic domination of world markets, as is the case of motion picture distribution throughout the world (Sánchez Ruiz, 2003b).

A great "competitive advantage" of U.S. audiovisual producers and distributors is their practically exclusive, oligopolistic access to the biggest market in the world, in terms of purchasing power and consumption habits. According to data of the MPAA (which congregates the seven major companies of the sector), in 2003, from an estimated total box office world sales of US \$20.3 billion, almost half (46.6%, or \$9.5 billion) was collected in the United States (MPAA, 2004³). With only 18.2% of the admissions, American moviegoers paid almost half of the global box office in 2003, because, on the average, they attend cinema more than five times a year. The respective proportions were relatively more balanced for Latin America, which registered 300 million admissions (3.5% of the world total), which meant 3.9% of the box office revenues worldwide. Of those \$20 billion, Latin Americans spent only 4% (approximately \$800 million). According to the same document, among the 20 countries with more admission revenues, Mexico was in the 9th place (\$430.7 million), Brazil in 11th (\$234.4 million), and Venezuela 20th (\$35.6 million). Spain occupied the sixth rank with sales of \$761.2 million. Thus we see that there is an enormous gap between the capacity of the U.S. market (\$9,500 million) and that of Latin America. Only three countries of the world exceeded \$1 billion in box office sales that year: the United Kingdom (\$1.4 billion), France (\$1.2 billion), and Japan (\$1.2 billion) (MPA, 2004).

On the other hand, there is a fundamental imbalance due to what we have called "market protectionism," because of the oligopolistic closure of U.S. distributors to other countries' films. So, although in many of our countries we find that the proportion of Hollywood movies oscillates between 70% to almost 100%, for example in 2002, only 6.1% of U.S. box office came from abroad (4.6% from Europe and 1.5% from the rest

of the world), so 93.9% was the product of national films (European Audiovisual Observatory, 2003b). This type of unequal exchange relationship usually ends up in a deficit for the weakest party. We do not have the aggregate data for the total exchanges of Latin America with the United States, but we can see in Table 14.1 the case of European exchanges with the United States.

Remember that the U.S. market is where almost half of the global motion picture sales are carried out, but it is a market almost totally closed to foreign productions, in many cases even to coproductions in which U.S. investment capitals participate. In fact, most of the European movies that are exhibited in United States come from England, so that the "neoprotectionism" we mentioned operates practically for every country, with a relatively smaller intensity due to linguistic affinity. But we know that movies are not only for theatrical exhibition. Thus, in 2002, Jack Valenti, at the time the president of the MPAA, said that the MPAA member companies would earn world revenues of about \$32 billion, of which nearly 40% would originate from the DVD market.⁴ There also was the market segment of broadcast and pay television, and the evolving Internet download niche.

Table 14.1. Sales of Motion Pictures and Television Programs, European Union/United States (in Millions of Dollars, US)

Years	1995	1996	1997	1998	1999	2000
Sales of United States in Europe	5,331	6,262	6,645	7,313	8,042	9,031
Sales of Europe in United States	518	614	668	706	853	827
Deficit Europe/Surplus United States	4,813	5,648	5,977	6,607	7,189	8,204

Source: Adapted from data in European Audiovisual Observatory (2002).

GLOBALIZATION AND UNEQUAL INTEGRATION

We have insisted elsewhere that the development pattern based on neoliberal ideology, or the "globalization" option that prevailed during the latter part of the 20th century, produced international inequalities (Sánchez Ruiz, 2003a). So-called globalization, the current stage of the long historical development of capitalism, is distinguished because the contemporary world is profusely—although asymmetrically—interconnected by intertwined networks and multiple flows of trade, financial transactions, information, and culture (and even sometimes flows of people). A contributing factor to the dominance of such a configuration has been the recent, swift development of the advanced information and communication technologies (ICTs), the fundamental core of the "information economy," in its turn the foundation of the so-called "network society" (Castells, 1997). The most outstanding of such recent technological achievements has been digitalization, and the process of so-called "digital, or technological convergence"; that is, the articulation of (a) telecommunications (telephone, satellite communication), with (b) the information technologies (computers and all their peripherals, which have facilitated the constitution of great networks, such as the Internet and the World Wide Web), and with (c) the CIs, in particular the audiovisual media, greatly powered by digitalization (Sánchez Ruiz, 2000). Although convergence is technological in the first instance, communicationally it makes it possible for one content to be undifferentiatedly conveyed by way of diverse platforms: A motion picture can be watched in the movie theater, which could receive it through satellite signals, which might originate in a distant DVD player, or maybe from a remote computer's hard disk; or through basically the same processes, it can be seen on TV, either broadcast or by satellite or cable; or it could be downloaded from the Internet, or have been bought in a prerecorded DVD. To this day, probably the "great synthesis" of the convergence potentialities is the Internet. Soon we will be downloading music and motion pictures from cell phones. Technological convergence has come hand in hand with new forms of consolidation: corporate horizontal and vertical integration of firms that previously did not have direct business linkages. For example, telecommunications companies (phone or satellite firms) have merged with computer (hardware, as well as software) corporations, and with firms in the entertainment field, in particular, from the audiovisual media (mergers of the AOL-Time Warner type).⁵ Apparently, the trend toward concentration and centralization of capitals, present in corporate convergence, continues contradicting liberal thought, which assumes competition as the base and essence of "market freedom."

The *form of incorporation* of the diverse countries to the contemporary multidimensional process of globalization is a function of many factors, one of which is fundamental: the degree of previous economic power, which in turn translates into a greater or lesser "market power" in the world economic arena. So, this new planetary fabric is not horizontal and equitable, but asymmetric, hierarchical, and its historical configuration responds to the distribution of power on a global scale, in economic terms as well as in military and political terms (Heintz, 2003; Krugman & Venables, 1995; Pieterse, 2004; Sánchez Ruiz, 2000). We are not completely sure if our present world, in the post-Cold War period, is "unipolar" or "multipolar" (Huntington, 1998) but in the case of the American Continent,⁶ we do not have any doubt that there is a reigning power, in economic, military, political, and cultural terms (the United States), followed by a country with a high degree of economic development (Canada), and then by a small group of nations with a medium level of prosperity (Brazil, Mexico, Argentina, and Chile); and finally, a "periphery" of poorer countries—with differences among them—in the rest of Latin America and the Caribbean. In Immanuel Wallerstein's (1976) terms, the American "world system" would consist of a center (the United States, maybe along with Canada, which relates very little to Latin America in general), with a "semi-periphery" (Brazil, Mexico, Chile, Argentina, Venezuela), and a "periphery" that consists of the rest of the nations in the continent, excluded to a greater or lesser extent by modernity and capitalist development.⁷ As it would be expected, the flows of trade and investment, information, entertainment, and the like, take place with that same direction and order of intensity. The "Pan-American audiovisual space" is structured in these same terms: We have in the first place, the great cinema and television producer and exporter, not only of the continent, but of the whole world: the United States. Because of linguistic and cultural affinity, English-speaking Canada is closely tied culturally with the United States (whereas the Province of Québec is a little less articulated, and it is a little more audiovisually self-reliant, given its relative linguistic isolation). Canada is not in itself a big audiovisual producer (an average of about 40 feature films a year, compared to more than 450 from the United States), but beyond being already a great consumer market for Hollywood, it is becoming an important motion picture "assembly plant"⁸ for the U.S. industry, which in its turn is enhancing Canada's own productive capacity, although within a pattern of a "highly asymmetric interdependence."⁹ Canada barely sustains audiovisual exchanges with Latin America, although lately some films do flow from Canada to some Latin countries, basically to be exhibited on pay TV. Mexico and Brazil are the main audiovisual producers and exporters in the non-English-speaking American continent (in particular of TV programs, especially *telenovelas*), followed by a few other countries, such as Argentina, Venezuela,

Colombia, and Peru. But the Latin American countries that are high exporters are also great importers (MR&C-Spain, 1998),¹⁰ in particular regarding the motion picture industry.

It is difficult to explain within the limits of this chapter that we do not hold a linear and simplifying image of "dependence relationships" that would operate mechanically and demonstrate some relentless law of "development of the underdevelopment" (Sánchez Ruiz, 1996). In any event, substantively as well as methodologically, we follow a conception of the sociohistorical processes as complex and changing (Sánchez Ruiz, 1992). In this sense, we agree with García Canclini (1999) when he asserts that "So as not to fetishize the global and, therefore, so as not to polarize excessively its relationships with the local, a fruitful methodological principle is to consider, among center and periphery, north and south, the proliferation of networks dedicated to the 'negotiation of diversity'" (p. 31). At the level of the articulation of national social formations to the world system, we think that the "periphery" and "semi-periphery" categories still are useful for analysis (Wallerstein, 1979).

Now, some people—especially those from within the great "imperial power"—(see Boyd Barrett, 2006) think that Latin Americans should integrate with the United States, through the so-called Free Trade Agreement of the Americas (FTAA).¹¹ As cultural goods and services are considered by the U.S. government and industry associations as mere commodities, it follows that the CIs are thought to be just another economic sector that should be included in trade negotiations. But many have argued that "unfettered free trade," the "laws of the market," are actually equal to *laws of the jungle*, where only the strongest survive and the weakest necessarily lose, almost like in a zero-sum game (Sánchez Ruiz, 2002; from another viewpoint using game theory, see Cameron, 1997). For example, we have demonstrated that, despite the image that has been generated of Mexico as a "great audiovisual power," the North American Free Trade Agreement (NAFTA) has produced ever more unequal exchanges between the strongest partner (the United States) and the two minor associates (Canada and Mexico), and almost null linkages between the latter two (Sánchez Ruiz, 2001).

Since the time of the wars of independence there has existed the aspiration for some kind of integration of the Latin American nations, which have historical and cultural aspects in common, such as language (at least the Spanish-speaking ones, although there is linguistic proximity with Portuguese), the dominant religion (Catholic), some degree of racial mix (*mestizaje*), a rich and diverse native inheritance (historically subordinated by the European-origin population and *mestizos*), and so on. However, the formal attempts at economic, political, and cultural integration and articulation among Latin American countries that so far have occurred, have produced rather unsatisfactory results.¹² In any

case, the meaning of such a possible integration would be changing at the present time, as Rafael Roncagliolo (1999) comments:

In another text that serves as antecedent to this one (Roncagliolo, 1996),¹³ I have referred to the equivocal meaning of the syntagm "Latin American integration": I tried there to highlight how the word integration has changed its sign, because before it carried the unionist and defensive connotation of unity among poor countries to confront the powerful (a Latin-Americanist "integrate-ourselves"), while now, in spite of Bolívar, Martí and so many other, it appeals, rather, to the desires of incorporation to one of the blocks of the global economy (a pan-Americanist "being-integrated"). (p. 65)

In the case of the CIs and show business, Latin American integration currently seems to follow a "pan-Americanist" path, as Roncagliolo describes. It does not depart from public policies, but instead from the logic of the transnational market, and is subordinated to the interests of the United States. CIs. In the 1940s and 1950s, Mexico City was a center to which singers, musicians, and actors from all over Latin America converged to make themselves known in the subcontinent through movies, radio broadcasts and as recording artists. Now, there is a movement of displacement of such centrality toward Miami, where people ("the talent"), as well as capitals and firms, meet. This includes major transnational corporations (TNCs), even of Latin American origin (Sinclair, 2002, 2003). For example, among others, the Cisneros Group from Venezuela has moved its headquarters from Caracas to Miami. All this leads one American scholar to argue that: "For the music industry, just as for the audiovisual, Miami is the axis of Latin American integration" (Yudice, 1999, p. 213). Maybe we should speak of the Hollywood-Miami axis, where the current Latin American processes of audiovisual integration are taking place. Only two clarifications:

1. In his work, Yudice clearly documents the domination of the big TNCs over the recording industry (five majors, four based in the United States and one European, which do not necessarily impose, for example, American music, but rather "the majors control most of the Latin American stock"; p. 191); thus, there is not a conception of "cultural imposition"—at least, not immediate and direct.
2. The attraction of Miami (just as in the case of Los Angeles), and the consequent emigration of artists, firms, and capitals derive mainly from economic dynamics and do not necessarily comply with some of the U.S. government's explicit policy; so there

is not necessarily a notion of "imperialist conspiracy"—at least, not immediate and direct.

Regarding Latin American integration attempts in the audiovisual field, Argentinean analyst and moviemaker Octavio Getino (1998) made the following comment:

The tentatives at regional integration of Latin American cinema and, by extension, of the Ibero-American film, were present in numerous declarations and agreements, subscribed by our countries along more than six decades. Finally, they began to have some force of law less than a decade ago, when the first formal documents on integration, co production and a common market were signed in the city of Caracas, in October of 1989, and later on ratified by the national congresses of more than a dozen countries of Ibero America. (p. 13)

Those agreements signed in Caracas were the Agreement for Ibero-American Film Integration, the Agreement for Latin American Film Co-productions, and the Agreement for the Creation of the Latin American Film Common Market. The Conference of Film Authorities of Ibero-America was constituted when the latter entered into effect in May 1991, and an executive secretary was elected. Although in some cases these agreements became legal statutes, when being ratified by the respective congresses, so far they have been able to contribute little to the development of the audiovisual sector and especially to the articulation of the Latin and Ibero-American markets. On the other hand, departing from the Ibero-American Conferences of heads of state and government that began in 1991 in Guadalajara, Mexico, the idea was generated of what crystallized in 1997 as the Ibermedia Program, which constituted a fund to which several countries of the region contributed, with the purpose of encouraging co-productions, as well as distribution, marketing, and project development, and promoting training programs in the audiovisual field (Moreno Domínguez, 2002).¹⁴ Also in 1997, during the Festival of Mexican Cinema in Guadalajara, Mexico, the Ibero-American Federation of Film and Audiovisual Producers was formed.

Getino (1998) remembers the final statement of a meeting of experts in Mexico City in 1991, which stressed that the following:

The Latin American and Caribbean audiovisual space can get to constitute a strategic integration environment if our countries decide to concur and to exchange their own productions, boosting at the same time our own exports and importing anything that is produced anywhere else in the world, which may come to strengthen and to enrich the identity and plurality of our peoples. (p. 13)

It is clear that Latin American efforts toward audiovisual integration do not necessarily mean closure to U.S. productions, but instead offer greater openness to other film industries in the world. The problem is that—withstanding statements in favor of Ibero-American identity and integration—many Latin American governments continue to exercise market liberation and “deregulation” policies, and in the wider processes of economic integration, the neoliberal creed continues to prevail, instead of an attitude of solidarity toward—and among—the weak countries (Roncagliolo, 1999). Although authorities and participants in the audiovisual sector in Latin American countries are fully conscious that the operation of the oligopolistic market has only tended to widen the gaps between the national cinema industries and Hollywood, or in this case, to reproduce the asymmetries between semi-peripheral and peripheral countries, some governments continue implementing naïve neoliberal criteria in their policies. An example of the latter is apparent in a 2003 incident when an initiative was sent from the Executive Power of Mexico to the Chamber of Deputies (equivalent to the House of Representatives), which declared the dissolution of a number of state organizations, among them the Mexican Institute of Cinematography (Imcine), the Churubusco Studios, and the Center for Film Training (CCC, *Centro de Capacitación Cinematográfica*). These institutions act in support, or participate directly in favor, of the Mexican private motion picture industry (Ibarra, 2003).¹⁵ That is to say, practically the whole official support apparatus to the Mexican cinema industry almost vanished, on the grounds of not being “profitable.” But fortunately, the intellectual and film community mobilized politically, and was able to neutralize the intent (De la Cruz, 2002).

After two decades of worldwide neoliberal ideological dominance, this creed is increasingly being discredited, and people are beginning to think that it is necessary to counteract the undesirable consequences (on society, on the environment, etc.) of “unfettered market forces” and to balance the social disparities that they produce, through public policies, in the interaction of civil society, or the citizens, and the market, with the State (Villareal, 1997).¹⁶ It is now very clear that capitalist development based on the “Washington consensus” is a model that produces grave inequalities between great regions, among countries, and within them (Mattelart, 2002). García Canclini (2002) commented:

In light of this perspective, it is possible to re-examine the inequality between developed and peripheral countries, and even that between different modes of cultural development, for example between the Anglo and Latino. The appropriation, by private mega-companies, of the greater portion of public life has brought with it a whole process of unilateral privatization, trans-nationalization, and evasion of

responsibility with respect to collective social interests. How can we develop cultural policies that connect culture industries with the public sphere in a way that is both creative and in line with the logic that reigns in this current phase of globalization and regional integration? (p. 42)

It is not a matter of “de-privatizing” the local and regional CIs, but one of fostering their creative development with state support. In the same article, García Canclini indicated the following: “The State does not create culture, but it is indispensable in generating the contextual conditions and policies for stimulation and regulation that encourage the production of cultural goods, as well as in making culture more easily and widely accessible” (p. 56). But what is “Latin American cinema”?

DIMENSIONS OF LATIN AMERICAN CINEMA

In terms of worldwide box office and considering its whole history, it could seem that Latin American cinema has barely existed. At least that it is a conclusion reached by an analysis published by the Economic Commission for Latin America and the Caribbean (ECLA; Prieto, 2003), which reviews aid mechanisms to the international services trade of Brazil and Mexico. Economist Francisco Prieto scrutinized the Web page “worldwideboxoffice.com,” which contains a large database of world box offices and where, of the highest-ranking 2,000 films recorded from 1900 to 2003, only two were from Mexico: *Like Water for Chocolate* (No. 1,735) and *Amores Perros* (No. 1,870). The ECLA report added:

For the first one, only data for the United States market (US \$21.7 million) is available; the second collected US \$5.4 million in the U.S. market and US \$19.6 million in the world market. To put these figures in perspective, the most successful movie in history is *Titanic* (United States, 1997), with a world box office of US \$1.835 billion, of which US \$600.8 million were collected in the U.S. market.

On its part, the Brazilian *Central Station* (1998) managed to rank 2,025 among the 2,250 most attended movies in the period 1900-2003, with world revenues of US \$17.2 million, of which US \$5.6 million were generated in the United States market. (p. 45)

But it is not in global monetary terms that one should think of the Latin American film industries. The *cultural and historical experiences* that

derive from the consumption of some of the relatively few movies that Latin America has managed to produce and circulate cannot be measured within the box office parameter.

From another point of view, Latin American cinema actually has been the product of a few countries, the most developed of which we call "semi-peripheral." Getino (1998) asserted that the following:

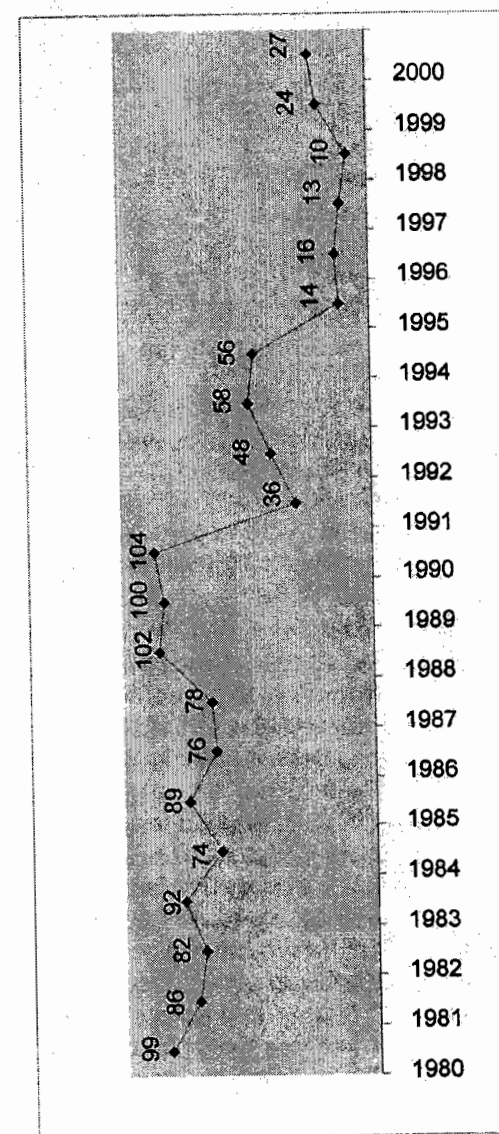
Let us firstly clarify that when we use the term "*Latin American cinema*," we simply make use of a conventional term. Among the approximately, 11 thousand movies produced from 1930 to 1996 in Latin America, 5,000 correspond to Mexico (46% of the total), 2,700 to Brazil (25%) and 2,000 to Argentina (18%). 89% of motion picture production concentrated in only three countries, relegating the remaining 11% to more than twenty republics of the region, *particularly those that decided to produce their own images through diverse support policies. Where there was not protectionist legislation for local production it didn't exist, except as an isolated or almost exceptional fact.* (p. 50, italics added)

This concentration of film production has its correspondence with the markets of movie consumption. In the same writing, Getino provides the following view:

The Ibero-American cinema markets concentrate on very few countries. Only three of them, in Latin America—Brazil, Mexico and Argentina—represent 74% of the global spectators of the region, together with 75% of the theaters and 83% of the revenues. If to these we add two other medium size countries, such as Colombia and Venezuela, the percentages rise, in the Latin American territory, to 87% of spectators, 85% of movie theaters and 90% of revenues. (p. 44)

Although only as many as five countries have generated most of the audiovisual imagery of Latin American origin, sometimes movies from some of the peripheral countries also have circulated, although usually through marginal circuits. On the other hand, certainly it has not been "the market" that has generated some progress, such as some relative successes that have been achieved by, not only Brazil or Argentina, but by Uruguay or Bolivia, Colombia, or Chile. This point is important. While very clearly the film industry of NAFTA's Mexico had been decreasing to the point of almost extinction (as an industry; Sánchez Ruiz, 1998; see Fig. 14.1) in countries where support policies have been applied some progress has been achieved (see Table 14.2).

FIGURE 14.1.
Mexico: Motion picture production, 1980-2000.



(Source: Sánchez Ruiz, 2001)

Table 14.2. Number of Feature Films Produced in Selected Latin American Countries, 1994-2003

Year	Argentina	Bolivia	Brazil	Chile	Colombia	México	Venezuela
1994	n/a	0	6	2	3	56	1
1995	24	5	18	2	3	20	9
1996	37	1	23	1	2	20	9
1997	28	0	22	1	4	15	5
1998	22	1	26	4	7	23	6
1999	27	1	31	4	3	37	4
2000	39	0	24	9	5	28	2
2001	39	0	30	14	1	21	3
2002	32	0	35	8	1	14	4
2003	67	2	27	14	8	29	3
2004	54	4	46	n/a	n/a	38	n/a

Sources: Adapted from García Canclini, Rosas, and Sánchez Ruiz (2006); Perelman and Selvach (2003); Silva Soto (2000); Secretaría do Audiovisual (2000); CNCA (2003); Zuleta, Jaramillo, and Reina (2000); and Guzmán Cárdenas (2001).

Most of the recent analyses on the Latin American audiovisual industries share a fundamental premise: Having to contend with U.S. power in the sector, it is not through (just) market mechanisms that Latin American image industries can re-emerge, but only by starting with an appropriate combination of *state and private* actions, and promoting *cooperation* among countries in the plane of co-productions and in the circulation of films throughout the subcontinent (see CNCA, 2003; García Canclini, Rosas, & Sánchez Ruiz, 2006; Guzmán Cárdenas, 2001; Perelman & Selvach (2003); Secretaría do Audiovisual, 2000; Silva Soto, 2000; Zuleta, Jaramillo, & Reina, 2000). The promotion of cooperation does not prevent the simultaneous existence and encouragement of competition within and between countries' industries. Another aspect that we should not forget is the linguistic and cultural affinities of the Latin American and Iberian countries. One of the factors that is used as an explanation of the success of the U.S. CIs, especially in the audiovisual industry, is the size (more than in demographic terms, but in purchasing power) of the English-speaking market (United States, England, Canada, Australia, New Zealand; Tunstall, 1977). The problem is that the Ibero-American countries are not used to exchanging and exhibiting each other's film products, as can be seen in Table 14.3.

Table 14.3. Gross Box Office Revenues, by Market of Origin**Ibero-American Countries, 1997 (%)**

United States	77
Domestic	10
Other Europe	9
Ibero-America	2
Other	2
TOTAL	100

Source: MR&C-Spain (1998).

Moviegoers from Spain, Portugal, and Latin America tend to prefer U.S. movies, and, to a lesser extent, their respective national motion pictures (when and where they are produced), and then, "other from Europe" (which means they are neither from Spain nor from Portugal), and finally those of the Ibero-American region. As one more example, we see in Table 14.4 the films offered and their consumption in Argentina in 2002. One can see that, although in terms of the number of titles, 2.6% of the films shown were from Latin America (not considering the number of screenings and weeks of exhibition), in terms of the number of spectators, the proportion does not even reach half a percentage point.

Such is the case for the whole region: To a greater or lesser extent, Latin Americans are not used to watching Latin American movies (as long as they are not national, and always after the U.S. films). In a recent

Table 14.4. Argentina: Number of Films and Spectators, by Origin, 2002

Country	Films (%)	Spectators (%)
United States	154 (50.5)	25,606,804 (80.6)
Argentina	55 (18)	3,255,779 (10.2)
Europe	70 (23)	2,735,797 (8.6)
Other	3 (1)	87,091 (0.3)
Latin America	8 (2.6)	60,700 (0.2)
Asia and Oceania	4 (1.3)	40,080 (0.1)
Total	305 (100)	31,789,281 (100)

comparative study on film offerings throughout the whole American continent, it was found that most of the movies shown (64%) were from the United States, with a range of 21.1% in Cuba and 92.3% in Paraguay. In terms of domestic offerings, the United States had 98% of national movies; Cuba ranked second with 33.3% and Argentina was third with 21.3% (Robledo, Alanís, & Said, 2003). Only eight American countries appeared with their own productions in the billboards (Argentina, Brazil, Canada, Chile, Cuba, the United States, Mexico, and Panama). However, some other countries, such as Peru and Ecuador, appeared with a few co-productions (Robledo et al., 2003).

In Europe, some taste for Latin American movies has been emerging, although very slowly and selectively: Between 1996 and 2001, the 15 countries of the European Union screened 91 Latin American films (EAO, 2003a). As it would be expected, the country that exhibited the most (60.8%) was Spain. In Portugal, 3,295 admissions were recorded, all of which were for one Brazilian movie. The Latin affinity is noticeable in the fact that, after Spain, the two countries that registered more admissions for Latin American films were France (14.3%) and Italy (6.9%). But, adds the report, "the relatively elevated share of admissions recorded in Great Britain (8.1%) should be noted: this is essentially due to the success of *Central do Brazil* and two recent Mexican films *Y tu mamá también* and *Amores Perros*"¹⁷ (EAO, 2003a). In the 7-year period analyzed, the three countries that provided the greatest amount of films and box office successes were Argentina (33 movies, with 42.5% of admissions), Mexico (19 movies, 23.3% of admissions), and Brazil (17 pictures, 21.3% of admissions). However, there also were movies from Bolivia, Chile, Colombia, Cuba, Dominican Republic, Jamaica, Peru, and Uruguay, according to the database of the European Audiovisual Observatory.

It is important to stimulate the film exchanges among the countries of Ibero-America in order to expand their circulation; to create publics for this audiovisual material that contains elements of cultural and linguistic affinity, for which the Ibermedia fund is an important beginning. The problem is that, as Table 14.5 shows, the number of "distribution/marketing" projects does not seem to be a priority, as are the production funding projects.

It is increasingly clear that any national or regional motion picture industry that aspires to have some presence in the international markets must reinforce its *distribution* mechanisms, because there lies one of the most important "competitive advantages" of the American audiovisual industry: their distributors' oligopolistic presence in practically any place on Earth (Guback, 1969; Ramos, Ojeda, & Méndez, 2003). It is interesting to notice that, for example, in a seminar organized by the office for Latin America of the Motion Picture Association (MPA-LA), there was

Table 14.5. Ibermedia Fund Projects, Mercosur Countries

Year	Countries	Co-Productions	Project Development	Distribution/Marketing	Training
2000	6	10	14	9	23
2001	6	17	11	13	12
2002	6	13	6	1	22
2003	6	15	11	2	1
2004	6	16	13	3	2

Source: "El programa Ibermedia y las cinematografías del Mercosur" (2006)

practically a total consensus among the Latin American participants about the need for state participation in the film industry, especially given the oligopolistic control of distribution, on the part of precisely those who convened the meeting (MPA-LA, 2002). A way through which the MPA tries to mitigate the problem of the lack of presence of domestic productions in the Latin American countries is by the promotion of co-productions between the U.S. majors and local companies in every particular case. The great problem is that *nothing* guarantees that these co-productions will have access to the U.S. market (or to any other market).

CONCLUDING REMARKS

It is fundamental for Latin Americans to rethink the way in which we are articulating ourselves to the world system of global capitalism, and that includes the CIs. During the past two decades, the dominant common sense, so-called "Washington consensus" has obstinately repeated that the motor of history is the unfettered mutual adjustment between offer and demand (the "laws of the market"). In the case of the audiovisual, the unfettered market forces seem to be leading us toward a "unipolar world" (Protzel, 2002). Additionally, during these two decades cultural and reception studies, distorted into a kind of audience populism, have insisted that media messages mostly do not have any effects on their publics; that no cultural homogenization processes emerge from the domination of a single worldview (the Western view, in its American version). They insist that there is actually a diversity of ways of dressing in jeans and of eating hamburgers. That there are no identities, but only

diversities, whereas the most powerful nation in history overflows nationalistic chauvinism, defending its right to control the oil and the cultures of the planet with the most sophisticated weapons that have ever existed, and by means of global media persuasion. Getino (1996) comments:

Economic globalization, reinforced by the United States' political and military hegemony, spreads to project itself upon culture, not as an exchange process and democratic "co-production" of identities, but as their annulment, that is to say, as an obstruction to the particularities and actual national diversities. In this context, the community that for some reason is forced to visualize only the images of other cultures in its audiovisual screens, ends up being alienated from itself, being hindered the construction of its own historical identity. (p. 14)

I think that not only the most economically advanced countries of Ibero-America, such as Argentina, Brazil, Spain, or Mexico, can dream of developing a vigorous, competitive, and creative national audiovisual sector. With a little more difficulty, but to the extent that mechanisms like the Ibermedia fund continue being generated and taken advantage of, the smallest nations might also be able to develop an incipient image industry. It is only a matter of not allowing the market fatality creed to prevail (a market that, by the way, is very far from completing the assumptions and expectations that the neoliberal ideology itself dictates, being in a constant concentration process). It is not through "natural laws" that finally resemble jungle laws that we can contribute to safeguarding cultural diversity in the world. Offer and demand in some cases, actually, do exercise structural pressures that can achieve in the short-term certain improvements in terms of prices or even qualities of some goods (supposing more or less competitive markets). But inexorably we are witnessing that blind capitalism leads us to devastate the environment, to enhance the gaps between the rich and the poor, to the loss of biodiversity, and to the shrinkage of cultural plurality in this world we inhabit. In the case of the audiovisual field, we need creative and organic policies to support all the phases of the business: from the development of the projects and writing of the scripts; the realization, marketing and audience creation; the distribution processes and the final consumption. We need a confluence, at the national level, of the State, civil society (with all its diversity), and of *what does work* in the market; just as we need to take advantage of the international integration mechanisms, by solidarity and political will, instead of by a mechanisms that reproduce inequalities. In the last decades something has been advanced, but there is a lot ahead to be done.

NOTES

1. Carmen Miranda used to wear hats that looked like fruit dishes and similar exotic clothes, in order to characterize some kind of "Brazilianness," or "Latin Americanness." Some Latin Americans do not feel represented by such an exaggeratedly colorful appearance.
2. The "highly concentrated" market structure refers especially to the oligopolistic distribution sector.
3. Although the year in the title is 2002, some data for 2003 are reported.
4. Remember that the MPAA member companies are part of bigger multimedia corporations, some of which are even a part of wider industrial conglomerates, such as Sony, whose "real" business is the hardware segment.
5. Although in the recent past such types of fusions could have existed, they were considered as *diversification* processes (and those companies were managed independently from each other), not as either vertical or horizontal integration.
6. Latin Americans are taught in primary school that the "American Continent" (long for "America") is comprised of North America, Central America, and South America. So, the whole continent is America.
7. This description departs from the point of view of simple geographical location, and in terms of future trends or, maybe, of "aspiration" (of some), for a future free trade area of the Americas. In terms of real, current commercial exchanges, the U.S. "world economy" would include to a much greater extent Europe, Japan, and China (next to Canada and Mexico) than Central and South America.
8. In the original in Spanish we use the term *maquiladora*, which refers to the industrial assembly plants located mainly in the border zones of Mexico (even though now there are *maquiladoras* all over the country, where TNCs take advantage of cheap Mexican labor).
9. An application of Johan Galtung's "asymmetric interdependence" category can be found in Straubhaar (1991).
10. This study shows that, in terms of the dollar value of exchanges, Brazil is the greatest audiovisual importer—including films, TV, and video—of Ibero-America (Latin America, plus Spain and Portugal). Although Mexico appears as the main exporter, it is shown that it is a *net importer*—in the end purchasing more than it sells, mostly from the United States.
11. Just after the Free Trade Agreement between United States and Chile was signed, the Entertainment Industry Coalition for Free Trade congratulated both governments (see EIC, 2003).
12. A very interesting account, with emphasis on media aspects, can be found in Roncagliolo (1996).
13. It is the text that we mention in footnote 12.
14. Twelve countries committed themselves to this fund, although it started in 1998 with the contributions of only some: Spain and Mexico provided more than 50%. In the following years, other countries have joined Ibermedia.
15. It is not a matter of state versus private cinema, but of the Mexican industry as a whole.

16. It is not even necessary to be a "radical" to be a critic of the environmental and social consequences of global capitalism. See, for example, among many—already "old"—proposals for alternatives (Giddens, 1999).
17. Portuguese and Spanish names in original.

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