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Mobile and Entangled America(s)

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Transnational Forces, Technological Developments, and the Role of the State in the Mexican Audiovisual Sector

José Carlos Lozano

This chapter provides an overview of the transformations of Mexican media culture in the last two decades and relates them to the radical changes in the country's economy, from a protectionist import-substitution model to a market-driven, neoliberal one. It reviews the role of internal and external economic, technological, and political forces in (a) the consolidation of national audiovisual and telecommunication conglomerates; (b) the transnational dominance of Hollywood in the distribution, exhibition, and consumption of films; and (c) the adoption of mixed and diverse media consumption patterns by national audiences. The chapter concludes that the unique combination of transnational forces affecting the national media culture and the still relevant power of the state to hinder competition in some sectors, have made of Mexico one of the countries in the world with a high concentration of audiovisual media and telecommunications.

As a developing country with striking contrasts in income, education, health and political development among different social classes and regions of the country, Mexico (112 million inhabitants and 14th largest economy in the world) has experienced in the last two decades an exponential growth in the supply of national and foreign audiovisual media contents and a slow but increasingly significant introduction and use of the internet and other digital media. In accordance with its uneven socio-economic development, the availability and impact of these new media have reflected a digital divide: some sectors of society (the youngest, highest educated, and better-off) have taken full advantage of the diversity and potentialities of old and new communication technologies, while the vast majority of the population (the middle and lower classes, the less educated, and the oldest inhabitants) are still dependent on traditional mass media like open-air television and radio for their information and entertainment.

According to Krotz (2007), globalization, individualization, commercialization, and mediatization are the most relevant processes influencing democracy and society, culture and politics in the long term (257). In this chapter, I provide an overview of the changes of the Mexican media system and media culture in the last 20 years (1990s and 2000s) and discuss them in the context of the radical changes in the country's economy, the consolidation of national media conglomerates,

articulation of the Mexican audiovisual sector with transnational actors and networks, and the mixed and diverse media consumption patterns of national audiences. In doing so, I provide some elements of comparison with other media studies in the world, which are being studied from a transcultural perspective (p) that avoids the "territorial essentialism" (6) characteristic of much current media research, and assesses the connectivity of Mexican media culture with transnational media conglomerates and flows.

Changes in the Mexican Economic System and Their Impact on Culture and Society

In the 1980s, Mexico began shifting to move from a protectionist approach to its economy based on the substitution of imports and imposed barriers to transnational companies, to an open, globalized neoliberal economy (Weiss 155). During the administration of Miguel de la Madrid (1982–88), the Mexican economy radically deregulated and liberalization in many areas of production and marketing, and in 1986, Mexico joined the General Agreement on Trade and Tariffs (GATT). The administration, headed by Carlos Salinas de Gortari, deepened and completed the process of deregulation and privatization, significantly modifying the structural organization of the Mexican economy, including the electronic media system and the telecommunications sector (Gómez 200; Lozano, "Políticas de comunicación" 37). The national telephone monopoly Telmex was privatized in 1990, and the national radio and television network IMEVISION was also privatized and converted into TV AZTECA in 1993. New film regulations were approved, allowing private and foreign investment in the production and distribution of Mexico's motion picture industry and a progressive decrease in the quota of Mexican films in theaters from 70 percent to only 10 percent (Lozano, "Políticas de comunicación" 38). Mexico, like experienced by many other countries in the 1990s (Thussu, "Introduction" 4), continued and intensified the deregulation and liberalization of the broadcasting and telecommunication sector.

On January 1, 1994, a free trade agreement with the United States and Canada under the North American Free Trade Agreement was put into effect (Lozano, "NAFTA"). In contrast with Canada, which included an exemption for its cultural industries due to the overwhelming dominance of American media, Mexico decided to include its cultural industries in the agreement, confident of the dominance of the internal audiovisual market of Televisa and TV Azteca and interested in opening the US Latino market for Mexican television, music, and films (Lozano, "NAFTA"). However, reflecting the prevailing ideological, cultural and economic contradictions coexisting in the country, on the first day the NAFTA went into effect a military and political uprising by Mexican Indigenous peoples in the southwestern state of Chiapas seeking justice and respect for their territorial rights occurred. The uprising, identified as "the Zapatista movement," was led by a white Mexican and former university professor, who adopted the title

of Subcomandante Marcos, asked for the rejection of the neoliberal economic policies adopted by the federal government and requested the establishment of public national policies in favor of ethnic minorities and the poor (Gilbreth/Otero 38). The uprising never extended beyond its original Chiapas territory from a very specific and reduced territory in Chiapas but had an unprecedented impact worldwide due to the extensive and creative use of the internet by the Zapatistas. Despite a strong left-from-center candidate, Andrés Manuel López Obrador, running in the 2000 and 2006 presidential elections with an anti-neoliberal agenda, the subsequent federal administrations of Ernesto Zedillo (1994–2000), Vicente Fox (2000–2006), and Felipe Calderón (2006–2012) continued to uphold neoliberal economic policies, opening some sectors of the Mexican economy while protecting to protect the audiovisual duopoly of Televisa and TV Azteca and rejecting proposals and initiatives for a third and fourth national broadcasting network. Thus, in the twenty years between 1994 and 2014, the Mexican economy has continued its trend towards privatization, deregulation, and modernization; and a media system under the control of private national conglomerates just as Mexican cinema remains controlled by Hollywood. By 2010, 26 million of the 28 million Mexican households (93 percent) had at least a TV set, 77 percent, a DVD player, and 44 percent, some type of paid TV (Huerta-Wong/Gómez 116).

Due to the size of the internal market and the protectionist policies applied by the federal government from the 1950s to the 1970s, the television network Televisa became one of the largest media conglomerates in the world. Today, it has interests in television production and broadcasting, programming for cable and satellite paid television, publishing and publishing distribution, radio production, professional sports and show business promotions, paging services, and feature film production and distribution (Grupo Televisa 2013). As owner of four of the six national television networks and 250 television stations in the country, Televisa reaches 97 percent of the Mexican television market and gets 66 percent of the total advertising revenue (Huerta-Wong/Gómez 123, 125). The only competition for Televisa is TV AZTECA, owner of the two remaining national broadcasting networks, 181 television stations, a recording company, show business enterprises and professional sports (123). TV Azteca gets 33 percent of total Mexican advertising revenue (125). Together, they form a duopoly that controls almost 100 percent of the production and distribution of open-air television in the country.

The Role of Mass Media in Mexico's Cultural Changes

The mass media in Mexico has played a major role in the cultural changes experienced by its population either give dates or say since some date in the last 20 years. According to Piedras (2004) the contribution of Mexican cultural industries to the country's economy by 2004 was 6.7 percent of the GDP, an impressive

percentage that may have been greater in 2012 (19). Exposure to television has remained extremely high, and ratings show Mexicans still overwhelmingly prefer national television contents and music (Lozano, "Consumo y apropiación de cine" 177). On television, Mexican telenovelas (soap operas lasting only about 120 episodes and shown in prime-time), news, musical, and sports programs are by far the contents with the highest ratings, while US television series get modest reception by only some specific niches of middle and upper class youngsters and young adults, who prefer them over national programming (Lozano, "Media reception" 184; "El consumo y la apropiación de contenidos" 180).

Television

Ideological differences between the content of Mexican television programs and the content of their US counterparts, however, may not be that significant, due to the commercial nature of national fiction and entertainment programs, the increasing use of product placement within telenovelas, and the "modeling" of shows in accordance to the US examples. As Thussu argues: "In ideological terms, commercial contra-flows champion free-market capitalism, supporting a privatized and commodified media system. One should therefore avoid the temptation to valorize them as counter-hegemonic to the dominant Americana" ("Mapping Global Media Flow" 28). The large media conglomerates Televisa and TV Azteca control almost all of the production, distribution, and transmission of both local and national programs, and it is clear that both follow the economic logic and are in favor of free-market, capitalist, and consumerist values (Gómez; Orozco, "Mexico").

Through their exposure to national television, Mexican audiences may have increased their exposure to a consumerist, individualistic and materialistic ethos very similar to the one found in American television (cf. Esteinou). According to Garcia Canclini (2004), the changes facilitated by a boundless excess of information and entertainment, a combination of mediatization and interconnectivity, have led to fragmented and unsystematic perceptions of life for Mexican audiences, especially youth (173). Current media experiences privilege the moment and the ephemerality of time: "The hyper reality of the instant, the transitoriness of the songs they have to listen to each week, the celerity of superficial information and communication ends in oblivion [...] everything is developed to maximize its impact and become instantly obsolete" (175). At the beginning of the twenty-first century, Mexican audiences were ranking infotainment as their most preferred type of television programs, surpassing the historical first place of telenovelas, and the Mexican version of *Big Brother* was one of the most watched shows in the country (Orozco, "La televisión en México" 236–9). Telenovelas, the most important local production in fiction, on the other hand, have changed significantly in the last decade, moving to a more commercial format where the interpretation and recreation of the local cultural context has been replaced by superficial marketing gags, like nude torsos, fragmentation of the narrative in small

capsules, the inclusion of multiple plot points, the use of actors and actresses, who pose as models wearing high-design clothes, and the marketing of clothes, beauty products, bubble gum, and creams with references to the programs (Orozco, "Los estudios de recepción" 17–19).

That said, having stated that, it could be argued that there are some ideological differences between local and national news, comedies, sports and telenovelas and their US equivalents. The differences are relevant at the economic level because local productions provide jobs and circulation of money in the country, and they are relevant at the cultural level because, despite ideological similarities between US and local production, there will always be differences in culture and values expressed, positions, and values between them. The specific codes used television programs change for each culture, and the conventions, practices, rules, settings, nuances, understandings and intertextual references are not completely equivalent preventing comparisons between US readings and appropriations (cf. Martín-Barbero).

The transnational dimension in Mexican television, however, despite high ratings for local productions, has been in full swing since 2010. While US imports occupy only about 30 percent of total programming time in the main national networks (Martínez/Lozano 55), the growth of paid television and the introduction of online video streaming services like iTunes, Netflix, Crackle and Vudu, as well as the popularity of YouTube among Internet users have increased the availability of US media contents to Mexican audiences. Imports from the US, however, are not the only factors contributing to the increase in foreign television materials to Mexico. Since (and give a date), Televisa and TV Azteca have imported more formats and scripts than ever from other countries, from *Big Brother* (the Netherlands) to telenovela scripts (Colombia, Argentina, Chile), to games and reality shows (Spain, Peru), to dramatic series (Argentina). By adapting programs that have been very successful in other parts of the world, the Mexican television conglomerates have been able to cater to local acquired tastes and consequently to get more revenues from the internal and external markets by maintaining the ownership on the final products.

Films

If the transnational dimension is tempered in the case of television by the strong market dominance of Mexican productions, the case of films and cinema is very different. Here, Hollywood's dominance on national screens is almost total and, a constant flow of US movies brings values, ideas, visions of the world and representations of ethnic groups and minorities from the powerful neighbor to Mexican audiences.

With the turn of the Mexican government to neoliberal policies came a significant decrease in public policies supporting the production and exhibition of Mexican films. Subsidies diminished greatly, screen quotas were reduced at a minimum of 10 percent, the requirements and regulations for distribution of

motion pictures in the country were relaxed so much that the Hollywood major media companies took control of it, imposing conditions and quotas favoring US productions on the Mexican or transnational exhibitors (cf. Matute). US films and US co-productions accounted in 2004 for about 90 percent of total screening time, in contrast to 50 percent of total screening time during the 1980s (Martínez/García/Menchaca 40; Matute). According to the Mexican Institute of Cinematography (IMCINE 25), 89 percent of the attendance to movies exhibited in 2011 in the 5,116 screens in the country was for Hollywood films, 6.8 percent for Mexican movies, 2.9 percent for European films, and only 1.1 percent for films made in Latin America or Spain (IMCINE 16).

If we add to these figures all the US movies watched on television, DVD, or through online streaming services like Netflix, it is clear that motion pictures are the transnational media content more pervasive and popular in Mexico. Open-air television networks and stations broadcast a total of 5,595 films in 2011. Only one of the 20 movies that got the highest ratings in that year was a Mexican production, a comedy from the Golden Age. The rest were all Hollywood films: *Ratatouille*, *Apocalypse*, *Twilight*, *Ice Age*, *Harry Potter*, *Titanic*, *I am Legend*, and so on (IMCINE 70). Sixty percent of the total number of DVDs authorized for sale in Mexico during 2011 were for US productions.

Although low, the counter flow of films produced in Mexico and the role of the government in providing subsidies and support to them seems to be increasing. In 1997 only nine Mexican movies were produced, the lowest number in 60 years (IMCINE 79). In 1999, the government created a modest fund, Fidecine, to provide financial support and incentives for the production of quality, commercial national films. In 2007, however, the government passed a law allowing the exemption of taxes and other benefits that would prove much more successful in promoting the production of films. From 2006 to 2011, Mexican directors and studios produced between 64 and 73 feature films per year, many of them (around 80 percent) with the help of the Mexican Institute for Cinematography (IMCINE 63). While many of these films have been as commercial and superficial as most Hollywood movies, there have been national productions providing real alternatives and local perspectives on issues that are distinctively Mexican, like the violence of the drug cartels (*The Hell*, *Saving Private Perez*), Mexican folkloric legends (*La Llorona*), or adaptations of Latin American novels (García Marquez's *Memories of my Sad Whores*).

The consumption of Mexican movies, in accordance with their low number in the audiovisual supply, continues to be discreet in comparison with the preference for Hollywood productions. As mentioned above, only 6.8 percent of cinema attendees were for Mexican screenings and only one of the 20 movies getting the highest ratings in open-air television was a national production (16). In contrast, 75 percent of the 20 movies with the highest ratings in that year in paid television were national movies, most of them from the Golden Age of Mexican films (1937–50), a fact that shows the emotional attachment Mexican viewers have for the motion pictures produced in that

epoch and that open-air television was not providing enough screenings for Mexican audiences.

While the distribution of movies is largely in the hands of the major Hollywood media companies still exert some control over the exhibition venues. Mexico has the world's fourth largest movie exhibitor, the national group Cinépolis, owner of 242 cinema venues in the country with a total of 2,293 screens (Cinépolis). This powerful group, owned by the Mexican Ramirez family, has expanded to several Latin American countries, including Central America and Brazil, where it is now the third largest exhibitor. This local ownership of movie theaters, however, does not represent any particular advantage for the exhibition of Mexican films. Cinépolis and the other national or transnational chains are close partners of the Hollywood companies' distribution companies and, in order to get US blockbusters from them, they give preferential treatment to all the other Hollywood movies that may or may not be that attractive but that are promoted. As Rosas Mantecón (2007) explains, despite the growth in the number of screens in Mexico, the diversity in the supply of films has decreased instead of growing, focusing almost exclusively on the exhibition of US films (320). Furthermore, the exhibition of movies has moved in the direction of the macro economic and social processes restructuring leisure and consumption in the cities, moving cinema venues from independent palaces in downtown or in the suburbs to multiplexes in the commercial centers (malls), the new social spaces where the middle and the upper classes shop, interact and look for entertainment. While in 1994 only five percent of Mexicans mentioned malls as their favorite place to spend their leisure time, by 2003 that percentage had risen to 33 percent (328). Dozens of cinema houses for working class viewers all over the country have closed in the last 20 years as a result of this commercial logic of concentration and urbanization (322), leaving audiences in small cities with few or a with no cinematographic venues.

In sum, the developments in films and movie-going in the last 20 years in Mexico, represent a clear example of a type of media culture that is much more deterritorial, as Hepp argues, than the more limited national-territorial one of Mexican television. In this sense, the Mexican media culture oscillates between a dominant presence of the transnational US-led Western media in films and an also dominant "contra-flow" of national television contents that may not be ideologically that different or less commercially-oriented than their transnational counterparts (Thussu, "Mapping Global Media Flow" 11).

Introduction and Expansion of Streaming Video Services

After the first connections to Internet in the late 1980s by some Mexican universities (Islas), the expansion of it in the country advanced very slowly. In 1998, 10 years after its introduction, only about 900,000 inhabitants had Internet access (Gutiérrez/Islas) out of a population of about 97 million (INEGI). By 2007, however, 24 million people had access to it, about 26 percent of the

total population (AMIPCI, "*Hábitos de los usuarios*") and by 2012 the number had increased to 41 million ("*Hábitos de los usuarios*"), about 37 percent of the total population. In 2012, Mexican Internet users were devoting four hours and nine minutes per day to look for information, check their email, play video games, and participate in social network sites like Facebook and Twitter, in that order ("*Hábitos de los usuarios*").

Adding an important alternative to the controlled audiovisual market in Mexico, Netflix arrived to the country in September 2011, and by the end of 2014, it had become extremely popular, with 640,000 subscribers, an increase of 256 percent in 18 months (O'Neill). In August 2012, Walmart chose Mexico as the first country outside the United States to launch its Vudu online video streaming service (cf. Sanchez) increasing the availability of US movies and television programs for the Mexican middle and upper classes. Crackle, a free ad-supported online video streaming service owned by Sony, also started offering its service in Mexico in April 2012 (cf. De la Fuente).

Relevance of the Mexican State

The Mexican state, despite the obvious and overwhelming transnational forces and dimensions influencing the supply and consumption of media, has shown some limited power and relevance since the 1990s, influencing the rules of the game for traditional and digital media, limiting the participation of new players and working closely with the big ones to protect them against foreign and national competitors. However, as Krotz explains, in a capitalistic system most developments and changes depend on the economic dimension (259), and the deregulation and liberalization of the Mexican economy in the last 20 years has allowed for an increased transnationalization of the media system and weakened the power of the state to exert total control and guide the development of the current Mexican media culture. The deterritorial thickening (Hepp/Couldry 32), present since the beginning, has been gaining more relevance, increasingly connecting the Mexican public sphere with foreign media conglomerates and foreign media contents expanding a complex, mixed consumption of transnational, national and local information, entertainment and social communication in a package that promotes, in the end, similar consumerist values.

As Hepp explains, the forces of transnationalization may coexist with still powerful national countervailing forces. The case of Mexico shows clearly that the cultural, social and economic developments in the media system in the last two decades have been the product of unstoppable external influences produced by globalization and transnationalization, but it also makes evident that the nation-state continues to have enough relevance as a key player in affecting the way the system develops. The Mexican communication and telecommunication sectors, through the combination of these external and internal forces, remain ones of the most concentrated and least diverse in the world (Hoerta-Wong/Gomez 150–52).

Discussion

In this chapter, I have reviewed some of the developments and changes in Mexican media culture since the 1990s using a theoretical perspective designed to detect the connections and articulations between the internal and the external forces shaping the audiovisual and telecommunication sectors and the Internet. The discussion had focussed on ways in which the changes in the Mexican economic system towards deregulation and liberalization, the public policies protecting the television duopoly from competition, and the dominant transnational flows of movies and other cultural products have created a complex supply of local and foreign media contents and consumption patterns.

As predicted by Krotz, the single most important factor influencing and transforming Mexican media culture seems to have been the changes in the economic system. The move of the country to a neoliberal economy, away from the long-lasting protectionist economic system based on imports substitution and barriers to foreign franchises and companies, led the government to deregulate the audiovisual media and the telecommunications sector, to privatize public television networks, film distribution, and telephone companies, to reduce quotas and subsidies for the production and screening of Mexican films, and to allow the arrival of online video streaming services like Netflix, Crackle, and Vudu: making it impossible to contain the growth of paid television with dozens of transnational television channels. All these factors derived from the profound changes in the economic system and the arrival of globalized and transnational technological developments and flows. Digital technologies multiplied the supply of national and foreign audiovisual contents, while the neoliberal policies adopted by the government favored the strengthening of the commercial features in the media culture and a decrease in its support and defense of public cultural industries and policies. These transformations of Mexican media culture, consequently, may be significantly changing the way in which Mexican audiences perceive and relate to their culture and to the global transnational dimension, adopting notions and processes of multiculturalism, hybridity, and heterogeneity (Thies/Raab 6).

However, what Straubhaar ("*Brazil*" 134) has argued for the case of Brazilian television seems also to be relevant in the Mexican case: the state has mattered because it has played an important role in shaping the national television system in the last 20 years, facilitating and allowing a high concentration of ownership and control of broadcast television. Through a close alliance with the national dominant players in the audiovisual (Televisa and TV Azteca) and the telecommunication (Telmex/Telcel) sectors, the last four administrations have set the conditions for the prevalence of a duopoly in broadcasting and a single dominant player in mobile and fixed telephony. That close alliance between the media and the national conglomerates has not always been straightforward or without tensions and occasional confrontations. In the end it has been consistent during the last two decades, allowing those two sectors to be less diverse

and more concentrated vertically and horizontally than the prevailing media systems in more capitalistic and open markets like the US, Canada, and most European countries.

Within this limited media framework, Mexican audiences show some signs of activity and resistance, selecting media contents not according to their volume in the supply but according to how culturally close they feel to them, preferring certain national programs over foreign ones, selecting some few foreign television contents and choosing US movies overwhelmingly without ignoring good Mexican films when available (Lozano, "Consumption" 693–97).

Despite the clear transcultural origins and links of Mexican traditional and digital media, the current commercial alliances between local and transnational media conglomerates, the high volume of imported contents and the mixed consumption patterns in its media culture, most Mexican media research is still characterized by a focus on the relationship between the state and the media system within national boundaries. Research on political communication, mass communication, audience research and even digital media, with some exceptions, has tended to center on local dimensions and specific media ignoring or taking just as incidental translocal and transcultural elements, adopting what Hepp, following Beck, calls "a container theory" of society (1). In contrast to this way of approaching research on media cultures, we need to acknowledge, as Hepp argues, that "the present media landscape is marked by a higher complexity in the wake of media globalization, that is the increase of media communication across national borders as well as the addressing of audiences across different states by different media products" (2). Future research on Mexican media culture and its changes would greatly benefit from theoretical perspectives able to make sense and to account for all the different complex external and internal influences and processes.

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